

Chatswood East, Sydney

Response to Council Request

Prepared for Woolworths Property Group

16th February 2011



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INTRODUCTION

This report provides additional information in relation to a proposed Woolworths supermarket development at Smith Street in Chatswood. It addresses a number of issues raised by Willoughby Council regarding the development and is prepared in addition to the Economic Impact Assessment previously prepared by this office for Woolworths Property Group in May 2010.

This report is structured and presented as follows:

- **Section 1** outlines a brief summary of the background information relating to key Council issues.
- **Section 2** provides a summary of existing industrial precincts within the Willoughby Municipality including Chatswood East and Artarmon. An outline of the various tenants, types of uses and number of vacancies within each precinct is provided. This section also outlines a detailed review of the existing workforce within the key Willoughby industrial areas and the changes that are likely to occur following the development of the proposed Woolworths supermarket at Chatswood East.
- **Section 3** presents an analysis of existing ‘Business’ zoned land within the Willoughby municipality that could potentially support additional supermarket floorspace. This will include reviews of key land parcels within the Chatswood Central Business Area (CBA), Northbridge and other relevant areas.
- **Section 4** provides a summary of the key findings of this report.

EXECUTIVE SUMMARY

- i. A number of key issues were raised by Willoughby Council regarding the possible development of a Woolworths supermarket at the Smith Street location in Chatswood East. The core issues that will be addressed in this report include:
 - Council wishes to maintain the supply of existing industrial land within the Willoughby Local Government Area (LGA).
 - Council indicates that there are adequately zoned areas within Chatswood to accommodate a supermarket.
 - Council has concerns regarding the likely impact on the economic viability of strip centres at High Street markets and Penshurst Street/Victoria Avenue.
- ii. While it is important that a provision of industrial land remains within the Willoughby municipality, it is equally important to recognise which areas would represent the optimal location for these types of facilities. It is clear that Chatswood East represents a key employment generating region within Willoughby and this should be maintained in the future, however, an analysis of the Chatswood East industrial area indicates a significant shift from traditional industrial uses, such as manufacturing and the like, to more varied uses, including traditional offices, light industrial, showrooms and bulky goods operators as well as retail facilities.
- iii. Chatswood East no longer represents a core industrial precinct and instead provides a variety of uses. Within Chatswood East, key industrial/warehouse facilities contain high levels of vacancies which reflect the fact that these types of facilities are no longer attracted to this region. Instead, major operators who would locate within industrial/warehouse areas prefer regions with increased main road exposure and accessibility, easier access to public transport and larger land parcels.
- iv. The proposed Chatswood East site occupies some 4,389 sq.m, which represents only 1.7% of the total 264,456 sq.m of industrial zoned land within Chatswood East. In addition, the proposed Chatswood East supermarket development would generate

more jobs in a single development than the growth in employment that is projected to occur within Chatswood East over the period to 2036 based on projections by New South Wales Department of Transport and Infrastructure.

- v. The addition of a supermarket at Chatswood East would represent an optimal use of the land and would provide a major employment generator within Chatswood East. The development would help to rejuvenate the surrounding area, leading to increased employment and viability within the overall precinct, whilst still maintaining Chatswood East as a key employment generating region of Willoughby.
- vi. An analysis of 'Business' zoned land within the Willoughby municipality that could potentially support additional supermarket floorspace indicates that there are no alternative locations that could viably support a full-line supermarket.
- vii. Existing zoned land that could easily support additional supermarket floorspace within the Willoughby municipality is limited. In order to accommodate a full-line supermarket centre, a land parcel of between 6,000-7,000 sq.m would be required. At a minimum, a block size of 4,500-5,000 sq.m would be required in order to accommodate a supermarket alone with basement level carparking. As such, the addition of a supermarket would require the amalgamation and consolidation of several land parcels and owners in order to be established.
- viii. Furthermore, each possible site currently accommodates a number of structures and existing uses including office buildings, residential properties, retail tenancies, mixed use developments and multi-storey apartments. It would not be viable to acquire and demolish these facilities in order to accommodate a supermarket facility.
- ix. The development of a proposed supermarket at Smith Street in Chatswood East would not impact on the viability or continued operation of any surrounding retail facility, including those along High Street, Penshurst Street and Victoria Avenue. These retail strips provide a range of convenience based retail facilities, however, do not include full-line supermarkets. The proposed Chatswood East development is planned to include supermarket only, with no supporting retail specialty floorspace

to be provided. As such, the proposed development will effectively serve a different market to the convenience and specialised shopping focus of traders within High Street, Penshurst Street and Victoria Avenue.

- x. As the proposed Chatswood East supermarket development will not include any supporting specialty stores, only the nearby food and grocery operators may compete with the proposed development. Based on a floorspace survey undertaken by this office in May 2010, there are some 16 tenants provided within the High Street Market precinct and 84 tenants provided within the Penshurst Street, Victoria Avenue precinct. Within these precincts some 4 and 6 food and grocery tenants are provided within each precinct respectively, translating to around 25.0% of traders within the High Street Market precinct and 7.1% of traders within the Penshurst Street, Victoria Avenue precinct. This further reinforces the viability of these precincts, with only a small proportion of tenants likely to compete with the proposed Chatswood East development.
- xi. These stores and facilities will continue to serve the needs of the surrounding population. In addition, these precincts are located along major roads within the locality and form key retail destinations for the surrounding population, attracting business from local residents and also passing traffic. These retail precincts are located over 1 km from the proposed Chatswood East site and as such, will continue to serve their location population catchments. A proposed supermarket at Chatswood East would complement these nearby retail precincts, allowing residents to undertake a full weekly shop locally instead of travelling to the large supermarkets within the Chatswood CBA or Northbridge.
- xii. Projected impacts on each of these facilities were represented in the Economic Impact Assessment prepared by this office in May 2010, indicating that likely impacts would be in the order of 5% on surrounding Willoughby facilities. At 5%, the projected impact would be minimal and is well within the normal competitive range of less than 10%.

- xiii. As outlined in the May 2010 Economic Impact Assessment, there is a substantial undersupply of supermarket floorspace within the region currently. The addition of a supermarket facility within Chatswood East would not only generate additional employment opportunities but would also provide an additional full-line supermarket offer to surrounding residents within the local area, increasing choice and price competition as well as reducing travel times, fuel costs and congestion at surrounding supermarket precincts such as the Chatswood CBA and Northbridge.

1 COUNCIL INFORMATION REQUEST

- i. This office previously prepared an Economic Impact Assessment for the proposed supermarket development at Smith Street, Chatswood East in May 2010. This report provides additional information regarding the proposed development and assesses the existing composition of industrial precincts within the Willoughby municipality as well as possible alternative locations for supermarkets within the Council area.
- ii. The report has been prepared taking into account the key issues raised by Council regarding the proposed development, including:
 - *“Council has consistently strived to maintain the supply of existing industrial land particularly for service industry in the LGA and subregion.”*
 - *“There are other opportunities for supermarket development in Willoughby including:*
 - o *Council has approved a supermarket (Woolworths) adjoining the Chatswood Interchange;*
 - o *The Royal North Shore Hospital Divestment lands at St Leonards.*
 - o *Redevelopment and expansion of the Northbridge Plaza Woolworths.”*
 - *“The Smith St proposal would not satisfy the ‘net community benefit test’ under the draft Centres policy due to ... the likely impact on the economic viability of strip centres at High St Markets and Penshurst St/Victoria Avenue.”*
- iii. This report will now address each of these key issues.

2 INDUSTRIAL AREA SUMMARY

This section reviews the composition of existing industrial zoned land within the Willoughby municipality, including Chatswood East and Artarmon. The review of industrial zoned land includes the following land zonings defined under the Willoughby Local Environmental Plan (LEP) 1995:

- 4(a) General Industrial
- 4(b) Light Industrial
- 4(c) Industrial Park.

Information provided in this section is based on a survey of each of the precincts, undertaken by this office on the 21st January 2011.

2.1 Chatswood East

- i. The Chatswood East industrial precinct is incorporated within the region bounded to the north by Boundary Street, to the east by Eastern Valley Way, to the south by Victoria Avenue and to the west by Barcoo Street and Warrah Street.
- ii. The Chatswood East industrial precinct encompasses some 264,456 sq.m of industrial land. The entire Chatswood East precinct is currently zoned 4(b) – Light Industrial. In order to assess the composition and uses within this precinct, each of the individual blocks has been assigned a number as illustrated in Figure 2.1.
- iii. A detailed summary of the composition of each block, including the site area, existing tenant, type of usage, number of storeys and the condition of the structure is provided in Appendix 1 (Table 1).
- iv. The Chatswood East industrial precinct encompasses 104 individual land parcels and incorporates some 420 tenancies. The majority of tenants comprise office/warehouse/industrial uses with the breakdown of tenant uses including:
 - Office/warehouse/industrial – 241

- Office – 33
 - Bulky goods – 19
 - Automotive – 17
 - Retail – 15
 - Other - 19
- v. In addition to the above, some 76 tenancies are currently vacant, representing a vacancy rate of around 18.1% (76 divided by 420). The 76 vacancies are estimated to total some 29,594 sq.m of floorspace (as compared to land size). As shown, this provision represents a significant provision of vacant floorspace.
- vi. Over time, there has been an increasing shift away from traditional warehouse/industrial units towards traditional office floorspace, smaller business operators as well as showrooms, bulky goods and retail facilities at Chatswood East. This shift is reflected in the composition of new developments within the region, including the new Bunning's Warehouse under construction along Gibbes Street and Smith Street, new storage facilities and facilities such as Fitness First Platinum.
- vii. The move away from traditional industrial warehouse facilities within the Chatswood East precinct is due, in part, to the current composition of the area, including a more affluent surrounding residential population, increasing land value, smaller block sizes and distance to major arterial roads and public transport facilities.
- viii. The addition of a supermarket development at Smith Street Chatswood would represent the optimal use of land and would provide a key employment generator within the region.

FIGURE 2.1 – CHATSWOOD EAST INDUSTRIAL PRECINCT



2.2 Artarmon

- i. The core Artarmon industrial precinct is generally bounded to the north by the Gore Hill Freeway/Lane Cove Tunnel, to the east by the railway line, and to the south and west by the Pacific Highway.
- ii. The Artarmon industrial precinct comprises some 638,718 sq.m and consequently is some 2.4 times larger than the Chatswood East precinct. Industrial land within Artarmon encompasses several industrial zonings including:
 - 4(a) General Industrial
 - 4(b) Light Industrial
 - 4(c) Industrial Park
- iii. The Artarmon industrial precinct has been broken down into a number of key land parcels as indicated on Figure 2.2. Some 50 parcels have been defined. A detailed breakdown indicating the land parcels, size and tenants within the Artarmon industrial precinct are provided in Appendix 1 (Table 2).
- iv. Similarly to Chatswood East, the majority of tenants provided within the Artarmon industrial precinct are generally focused on office/warehouse/industrial uses. Some 648 tenants are provided within the precinct, including some 34 bulky goods tenants and 29 retail tenants.
- v. Within the Artarmon industrial precinct there are 54 vacancies, which represent a vacancy rate of 8.6% (56 divided by 648). As shown, the Artarmon vacancy level is significantly below the Chatswood East provision.
- vi. While the Artarmon industrial precinct still includes several vacancies, the lower vacancy rate reflects the more successful nature of the precinct as compared with Chatswood East.

vii. The Artarmon industrial precinct includes a range of uses and a broader diversity of tenants. The success of the Artarmon industrial precinct can largely be attributed to the following:

- Close proximity to major roads, including the Gore Hill Freeway/Lane Cove Tunnel and Pacific Highway.
- Closer proximity to public transport including the railway station.
- Close proximity to major destinations including the Royal North Shore Hospital.
- Larger block sizes allowing for increased diversity of uses.

FIGURE 2.2 – ARTARMON INDUSTRIAL PRECINCT



2.3 Chatswood East – Worker Analysis

- i. Figure 2.3 identifies the Chatswood East industrial area as well as the defined Journey to Work boundaries that encompass the industrial precinct.
- ii. As indicated, the Journey to Work zones that are provided within the Chatswood East industrial precinct include zones **2380** and **2384**.
- iii. Journey to Work data released by the Australian Bureau of Statistics (ABS) presents a profile of the workforce within the defined region. This information is based on the 2006 Census of Population and Housing.
- iv. These Journey to Work Travel Zones are used to analyse local worker data (Travel Zones obtained from the New South Wales Department of Transport and Infrastructure).
- v. Table 2.1 details the 2006 figures for the number of workers within the Chatswood East region. As indicated, there are some 2,994 workers provided within the Chatswood East industrial area.
- vi. Table 2.1 also provides an overview of the socio-economic profile of the Chatswood East worker population. The socio-economic profile of the Chatswood East worker population reflects a lower than average income levels earned by workers within the region, as compared with the Sydney Central Business District (CBD) average. This is a result of the number of tradespersons and labourers represented within the Chatswood East industrial precinct.
- vii. Even though the Chatswood East precinct forms a traditional industrial area, a large proportion of workers are classified as managers and administrators, professionals and associate professionals as well as clerical and service workers, accounting for around 74% of the total Chatswood East worker population. This proportion indicates the change of uses away from traditional industrial facilities within the area over time.

- viii. Table 2.2 provides a summary of the proportion of workers within Chatswood East who specifically live within the Willoughby LGA. As indicated some 12.2% of Chatswood East workers also live within the Willoughby municipality.
- ix. Based on the Travel Zone Employment Forecasts prepared by the New South Wales Department of Transport and Infrastructure (October 2009 release), the worker population within Chatswood East (zones 2380 and 2384) is projected to increase by only 160 workers over the period to 2036.
- x. These findings indicate that the Chatswood East region employs a number of local residents, with limited growth in industrial jobs within this precinct in the future.

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TABLE 2.1 – CHATSWOOD EAST WORKER POPULATION SOCIO-ECONOMIC PROFILE

ZONE	Chatswood East Sydney CBD			
	2384	2380	Total	Average
Worker Population				
2006 Population	2,078	916	2,994	221,890
Age Distribution (% of Pop'n)				
Aged 15-19	2.4%	3.4%	2.7%	1.9%
Aged 20-29	22.3%	22.6%	22.4%	28.2%
Aged 30-49	49.8%	46.3%	48.7%	52.4%
Aged 50-64	23.0%	23.7%	23.2%	16.1%
Aged 65+	2.5%	4.0%	3.0%	1.3%
Average Age	40.3	40.5	40.4	38.0
Income (\$)				
Up to \$149	1.7%	2.1%	1.8%	1.6%
\$150-\$249	2.0%	2.4%	2.1%	1.8%
\$250-\$399	4.1%	5.9%	4.6%	3.7%
\$400-\$599	15.7%	13.2%	15.0%	8.4%
\$600-\$799	18.8%	14.5%	17.5%	11.4%
\$800-\$999	18.4%	12.2%	16.5%	12.4%
\$1,000-\$1,299	16.6%	15.1%	16.1%	15.6%
\$1,300-\$1,599	8.3%	10.8%	9.1%	11.3%
\$1,600-\$1,999	5.9%	7.0%	6.2%	9.6%
\$2,000 or more	7.7%	15.5%	10.1%	23.4%
Not stated	0.8%	1.1%	0.9%	0.8%
Average Income	973	1,083	1,006	1,244
Occupation				
Managers and Administrators	16.1%	16.4%	16.2%	13.6%
Professionals and Associate Professionals	24.8%	40.3%	29.5%	49.6%
Clerical and Service Workers	29.2%	26.3%	28.3%	31.5%
Tradespersons and Related Workers	16.3%	8.6%	13.9%	2.2%
Labourers, Production and Transport Workers	12.8%	7.2%	11.1%	1.8%
Other (incl. Not stated)	0.9%	1.0%	0.9%	1.2%
Transport				
Bus (incl. Bus and other, except with train)	4.1%	3.4%	3.9%	20.3%
Train (incl. Train and other)	7.2%	6.7%	7.0%	43.2%
Car, as driver*	71.6%	69.5%	71.0%	13.8%
Car, as passenger**	5.4%	4.5%	5.1%	3.2%
Other Methods	4.4%	3.7%	4.2%	10.3%
Non-travel (Worked at home - Did not go to work)	6.4%	11.7%	8.0%	8.5%
Not Stated	0.9%	0.5%	0.8%	0.7%
<i>*incl. any combination except train, bus, ferry, tram or taxi</i> <i>**incl. any combination with other methods</i> Sources : ABS Census of Population and Housing 2006				

TABLE 2.2 – CHATSWOOD EAST WORKER ORIGINS (WILLOUGHBY LGA)

Willoughby LGA Suburbs	Sum of Persons	% of Total
Chatswood	148	4.9%
Chatswood West	56	1.9%
Willoughby	40	1.3%
North Willoughby	37	1.2%
Castle Cove	17	0.6%
Northbridge	15	0.5%
Naremburn	13	0.4%
Willoughby East	12	0.4%
St Leonards	8	0.3%
Castlecrag	7	0.2%
Artarmon	7	0.2%
Middle Cove	4	0.1%
Total	364	12.2%
Chatswood East Worker Population	2,994	
Source: ABS		

2.4 Artarmon – Worker Analysis

- i. Figure 2.4 illustrates the Artarmon industrial precinct as well as the Journey to Work boundaries that are provided within this precinct. The key travel zones situated within the Artarmon industrial precinct include **2407, 2408** and **2411**.
- ii. The worker population situated within the Artarmon industrial area is currently estimated at 13,638.
- iii. Table 2.3 provides an overview of the socio-economic profile of the Artarmon worker population. The worker population reflects lower than average income levels for workers within the region as compared with the Sydney CBD average, however, it is slightly higher than the workers provided within the Chatswood East precinct.
- iv. Table 2.4 provides a summary of the proportion of workers within Artarmon who also live within the Willoughby LGA. As indicated some 8.7% of Artarmon workers live within the Willoughby municipality, which is lower than the 12.2% of workers within Chatswood East.

- v. The Artarmon worker population is projected to grow by 4,271 by 2036. (Travel Zone Employment Forecasts prepared by the New South Wales Department of Transport and Infrastructure).
- vi. As indicated, the Artarmon industrial precinct includes a much larger workforce currently, with this worker population projected to increase substantially in the future. The success of the Artarmon industrial precinct as compared with the Chatswood East precinct can largely be attributed to the following:
 - Close proximity to major roads, including the Gore Hill Freeway/Lane Cove Tunnel and Pacific Highway.
 - Closer proximity to public transport including the railway station.
 - Close proximity to major destinations including the Royal North Shore Hospital.
 - Larger block sizes allowing for increased diversity of uses.

FIGURE 2.4 – ARTARMON WORKER ZONES

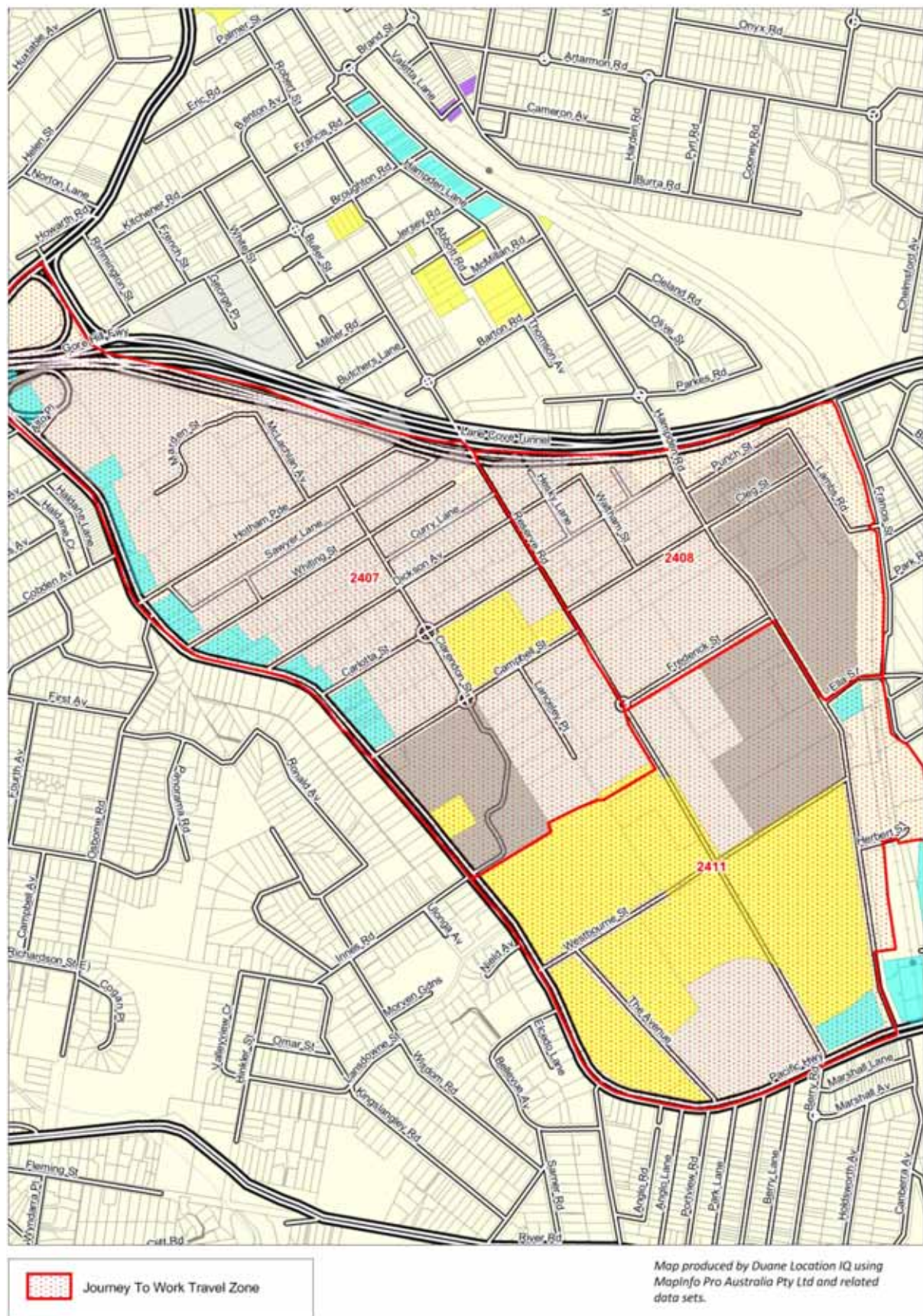


TABLE 2.3 – ARTARMON WORKER POPULATION SOCIO-ECONOMIC PROFILE

ZONE	2407	2408	2411	Artarmon Total	Sydney CBD Average
Worker Population					
2006 Population	4,342	2,183	7,113	13,638	221,890
Age Distribution (% of Pop'n)					
Aged 15-19	2.7%	1.6%	1.1%	1.7%	1.9%
Aged 20-29	24.2%	23.0%	22.3%	23.1%	28.2%
Aged 30-49	49.7%	49.7%	51.8%	50.8%	52.4%
Aged 50-64	20.8%	22.7%	23.0%	22.3%	16.1%
Aged 65+	2.5%	2.9%	1.7%	2.2%	1.3%
Average Age	39.5	40.4	40.4	40.1	38.0
Income (\$)					
Up to \$149	1.8%	1.6%	1.3%	1.5%	1.6%
\$150-\$249	1.6%	2.5%	1.6%	1.7%	1.8%
\$250-\$399	4.0%	4.8%	3.0%	3.6%	3.7%
\$400-\$599	11.8%	12.7%	9.2%	10.6%	8.4%
\$600-\$799	17.3%	17.1%	15.1%	16.1%	11.4%
\$800-\$999	16.4%	14.8%	16.1%	16.0%	12.4%
\$1,000-\$1,299	17.2%	19.8%	18.5%	18.3%	15.6%
\$1,300-\$1,599	11.0%	10.3%	12.8%	11.8%	11.3%
\$1,600-\$1,999	7.0%	6.6%	8.1%	7.5%	9.6%
\$2,000 or more	10.7%	8.8%	13.7%	12.0%	23.4%
Not stated	1.0%	1.0%	0.8%	0.9%	0.8%
Average Income	1,055	1,020	1,136	1,092	1,244
Occupation					
Managers and Administrators	14.3%	16.8%	9.3%	12.1%	13.6%
Professionals and Associate Professionals	27.8%	33.0%	63.6%	47.3%	49.6%
Clerical and Service Workers	21.6%	22.0%	20.6%	21.2%	31.5%
Tradespersons and Related Workers	19.8%	13.6%	2.1%	9.6%	2.2%
Labourers, Production and Transport Workers	15.5%	13.9%	3.4%	9.0%	1.8%
Other (incl. Not stated)	0.9%	0.9%	0.9%	0.9%	1.2%
Transport					
Bus (incl. Bus and other, except with train)	3.6%	2.7%	4.1%	3.7%	20.3%
Train (incl. Train and other)	9.7%	14.3%	20.0%	15.8%	43.2%
Car, as driver*	69.1%	63.6%	51.6%	59.1%	13.8%
Car, as passenger**	3.9%	4.1%	3.4%	3.7%	3.2%
Other Methods	6.4%	6.2%	7.1%	6.7%	10.3%
Non-travel (Worked at home - Did not go to work)	6.1%	8.3%	13.2%	10.2%	8.5%
Not Stated	1.0%	0.9%	0.7%	0.8%	0.7%
<i>*incl. any combination except train, bus, ferry, tram or taxi</i> <i>**incl. any combination with other methods</i> Sources : ABS Census of Population and Housing 2006					

TABLE 2.4 – ARTARMON WORKER ORIGINS (WILLOUGHBY LGA)

Willoughby LGA Suburbs	Sum of Persons	% of Total
Artarmon	277	2.0%
Chatswood	148	1.1%
Naremburn	143	1.0%
St Leonards	142	1.0%
Chatswood West	137	1.0%
Willoughby	127	0.9%
North Willoughby	59	0.4%
Northbridge	57	0.4%
Castlecrag	35	0.3%
Castle Cove	22	0.2%
Willoughby East	19	0.1%
Middle Cove	19	0.1%
Total	1,185	8.7%
Artarmon Worker Population	13,638	
Source: ABS		

2.5 Summary

- i. Taking the above into account, it can be seen that the Chatswood East industrial precinct is substantially smaller than the Artarmon industrial precinct and is unlikely to increase substantially in the future. Even though the Artarmon industrial precinct is some 2.4 times larger than the Chatswood East precinct (638,718 sq.m versus 264,456 sq.m), the Artarmon precinct employs over 4.5 times more workers than Chatswood East (13,638 compared to 2,994).
- ii. In terms of the concentration of employment generation, the figures above indicate that the Chatswood East precinct translates to one job for every 88 sq.m of industrial land, while the corresponding ratio within the Artarmon precinct is one job for every 47 sq.m.
- iii. This employment ratio difference will be emphasised further in the future taking into account the employment projections undertaken by the New South Wales Department of Transport and Infrastructure. These projections indicate that between 2006 and 2036, the number of workers with Chatswood East will increase

by 160, while on the other hand, the Artarmon industrial precinct is projected to increase by 4,271 workers.

- iv. While it is our view that employment generating lands should be maintained within Willoughby Council, the analysis above shows that the Chatswood East region is in need of rejuvenation and does not provide a current strong industrial employment zone. Even taking into account the employment projections by the State Government, this situation is unlikely to change in the future.
- v. In order to ensure the ongoing viability of the Chatswood East industrial precinct, there has been an increasing trend towards offices, showrooms, retail and mixed business uses. The large number of vacancies, however, continues to reflect the more difficult situation that Chatswood East faces as compared to other industrial areas such as Artarmon.
- vi. An analysis of workers within both the Chatswood East and Artarmon precincts indicate that around 74% and 81% of workers, respectively, are managers and administrators, professionals and associate professionals as well as clerical and service workers. This demonstrates the shift away from traditional industrial uses within these precincts.
- vii. Council have referred to the Willoughby Industrial Study, prepared for Council by SGS Economics in 2004, where it indicates a shortage of current land that is allocated to industry. However, despite the fact that this study is now seven years old, the supposed shortage of land is contradicted by the high number of vacancies that persist within Chatswood East in particular.
- viii. As indicated in the Economic Impact Assessment prepared by this office in May 2010, the development of a supermarket at Smith Street in Chatswood East would be a key employment generator within the region, creating some 176 jobs directly. Furthermore, some 167 jobs are likely to be generated in the broader economy as a result of supplier induced multiplier effects.

- ix. Additional jobs will also be generated during the construction of the project which will also have flow on benefits to the surrounding community.
- x. The site for the proposed Chatswood East supermarket occupies some 4,389 sq.m, which represents just under 15% of the total 29,594 sq.m of total vacant floorspace (as compared with land size) within Chatswood East and 1.7% of the total 264,456 sq.m of industrial land. The development of a supermarket at this site would result in an increased concentration of employment within Chatswood East, providing a strong anchor tenant and usage that would also result in the increased viability of the Chatswood East precinct through increased customer flows.
- xi. The addition of a supermarket at Chatswood East would not only create a number of employment benefits but would also be consistent with the current trend of facilities within the Chatswood East precinct, including a shift away from traditional industrial/warehouse uses towards showrooms, bulky goods and retail tenancies.
- xii. The proposed development would help the rejuvenation of the Chatswood East precinct and would ensure the ongoing viability of this region as a key employment destination.

3 SUPERMARKET SITE ASSESSMENT

This section reviews the business zoned land within the Willoughby municipality that could potentially accommodate supermarket floorspace under the existing retail hierarchy.

The review of business zoned land includes the following land zonings defined under the Willoughby Local Environmental Plan (LEP) 1995:

- 3(a) General Business
- 3(b) Special Business
- 3(c) Chatswood Secondary Business
- 3(d) Neighbourhood Business

In order to identify possible supermarket locations within the Willoughby municipality, it is important to understand the requirements of a supermarket development. In terms of the minimal land size, ideally a supermarket centre site would require 6,000-7,000 sq.m. A site of this size would be able to incorporate a full-line supermarket and some shops with a mix of at-grade and basement carparking. Assuming, however, that a supermarket is provided only (i.e. no specialty floorspace) with undercroft car parking, a minimum of 4,500-5,000 sq.m of land would be required.

For the purposes of this analysis, the Willoughby LGA has been broken down into a number of regions including:

- Northbridge
- Victoria Avenue, Chatswood and High Street, Willoughby
- Chatswood Central Business Area (CBA)
- Penshurst Street, Willoughby
- Pacific Highway, Artarmon
- St Leonards

- Castlecrag

3.1 Northbridge

- i. The Northbridge retail precinct generally incorporates the retail facilities provided along Sailors Bay Road near the Strathallen Avenue and Eastern Valley Way intersection.
- ii. The area zoned 3(a) General Business within the Northbridge precinct is illustrated on Figure 3.1.
- iii. The major retail facility within Northbridge is Northbridge Plaza. Northbridge Plaza is managed by AMP and encompasses some 6,600 sq.m of retail floorspace, anchored by a full-line 3,869 sq.m Woolworths supermarket and some 42 specialty shops.
- iv. Within the Northbridge precinct, existing blocks that could potentially support a supermarket are all less than 5,000 sq.m in size and as such, are unlikely to support a supermarket.
- v. Block A could potentially support a store being some 4,699 sq.m. Block A, however, has at least seven lots which would need to be consolidated. Furthermore, existing facilities on the seven lots would need to be acquired and demolished in order to support a supermarket development.
- vi. Existing uses within Block A include:
 - A four storey commercial office building.
 - A four storey retail and residential building.
 - A number of single level and two storey retail and non-retail facilities including five tenancies
 - One residential dwelling.
- vii. As a result, any consolidation of facilities on Block A would be extremely difficult given the dense nature of existing uses and the modern facilities that are

represented. It would also be unviable to replace these buildings with a supermarket facility.

- viii. The only site within Northbridge that would be suitable for an additional supermarket of any significant size would be the development of the Council owned car park site, immediately north of Northbridge Plaza. It is understood that AMP (the managers of Northbridge Plaza) have approached Willoughby Council on a number of occasions in order to reach agreement on an expansion of Northbridge Plaza, possibly including further supermarket floorspace. On each occasion, however, Willoughby Council has rejected the proposed plans by AMP and appear unwilling to develop the car park site at this stage.
- ix. Taking the above into account, the addition of further supermarket floorspace within Northbridge would be extremely difficult, costly and very unlikely. The cooperation and consolidation of only two land owners at the most obvious location, Northbridge Plaza, has not been able to be achieved.
- x. In addition, Northbridge residents are currently provided with a full-line supermarket at Northbridge Plaza, while residents within Chatswood East have to travel either to the Chatswood CBA or Northbridge for their full-line food and grocery needs. Northbridge is situated some 3.6 km south of the proposed Chatswood East site.
- xi. In summary, major issues precluding the development of a new supermarket within Northbridge include:
- There is not enough zoned land capable of viable consolidation on any of the zoned land to create a single level supermarket with at grade or basement car parking.
 - The multiple ownership of sites makes acquisition and amalgamation of land extremely difficult, if not impossible, particularly if one of the owners refuses to sell or holds out for a high price. The costs of acquiring the land also results in economic viability issues which would preclude a supermarket development.

- The presence of existing businesses on sites also means that these businesses would need to be acquired, adding to the cost of consolidation for a supermarket based shopping centre, making acquisition unviable financially.

FIGURE 3.1 - NORTHBRIDGE



3.2 Victoria Avenue, Chatswood and High Street, Willoughby

- i. A number of retail strips and precincts are situated in close proximity to the proposed Chatswood East site, namely Victoria Avenue in Chatswood and High Street in Willoughby. These facilities are provided around 1 km from the proposed Chatswood East site.
- ii. The area zoned 3(a) General Business within the Victoria Avenue precinct in Chatswood is illustrated in Figure 3.2. This precinct also incorporates the northern parts of Penshurst Street and is generally provided around the Victoria Avenue, Penshurst Street intersection.
- iii. As indicated, the provision of suitably zoned land around the Victoria Avenue/Penshurst Street intersection is quite limited.
- iv. Figure 3.2 illustrates the likely available land parcels (A and B) for supermarket development within this precinct, indicating sizes that are less than 3,700 sq. and as such, these sites will be unable to support a viable supermarket development.
- v. Block A incorporates an existing Bunnings warehouse and is owned by Multiple Holdings Pty Ltd. It is likely that with the opening of the new store at Smith Street, this store will close. Given the limited size of the site, a full-line supermarket is unable to be supported and it is likely that other retail uses will locate at this location in the future.
- vi. Block B, at 2,715 sq.m is too small to accommodate a supermarket development. Block B includes a two level office and retail centre as well as adjoining retail shops.
- vii. Also represented on Figure 3.2 is the High Street Plaza and High Street retail precinct in Willoughby. High Street Plaza incorporates Harris Farm as well as a small provision of convenience based retail specialty floorspace.
- viii. Land within the High Street precinct is zoned 'Neighbourhood Business' and includes small block sizes that would be unable to support a supermarket development.

FIGURE 3.2 – VICTORIA AVENUE, CHATSWOOD AND HIGH STREET, WILLOUGHBY



3.3 Chatswood CBA

- i. The Chatswood CBA forms the key retail, commercial and community precinct within the Willoughby municipality. In terms of retail uses, the majority of retail facilities are provided east of the railway line and generally focused around Victoria Avenue.
- ii. Retail zoned land provided on the western side of the railway line largely incorporates multi storey commercial developments, with a number including ground floor retail components.
- iii. The majority of business zoned land within the Chatswood CBA is zoned 3(c) Chatswood Secondary Business. The business zoned land is outlined on Figure 3.3.
- iv. A large proportion of retail zoned land on the eastern side of the railway line is occupied by Chatswood Chase and Westfield Chatswood, the two dominant regional shopping centres provided within the precinct. In addition, large blocks of land are also taken up by the Civic Place development, as well as Lemon Grove and Mandarin retail centres.
- v. Chatswood Chase and Westfield Chatswood each include a range of major national retailers, including popular supermarket operators.
- vi. While these major retail centres within the Chatswood CBA could potentially accommodate additional supermarket floorspace, we are unaware of any planned redevelopments at this stage. Figure 3.3 illustrates remaining land parcels within the Chatswood CBA that could potentially accommodate supermarket floorspace.
- vii. As shown, there are several parcels of land that are less than 4,000 sq.m (Blocks A and C). Both of these sites include multi-level developments and comprise several land owners. As a result, any supermarket development on these sites would be highly unlikely and unviable.
- viii. Blocks B and D are the largest viable remaining blocks within the Chatswood CBA, however, each of these also would require the consolidation of the land parcels and demolition of existing structures.

- ix. Block B is the largest within the precinct occupying some 6,384 sq.m. The block currently incorporates Chatswood Village. Chatswood Village is a retail and commercial development ranging between 1-5 storeys and providing over 66 different tenants. Some refurbishment of facilities has recently taken place at this centre. Given the density of the development it is not feasible that facilities within this block could be demolished to make way for a supermarket centre.
- x. The block listed as D would involve the consolidation of five lots. Existing uses within Block D include the Spring Street Marketplace, a two level retail centre incorporating 17 convenience based retail and non-retail facilities, two three level commercial office developments fronting Albert Avenue and a three storey building incorporating two levels of office and ground floor retailing. The consolidation and demolition of facilities within this precinct would be extremely difficult and is unfeasible.
- xi. A site situated on the southern side of Albert Street (Block E), formerly a Council owned car park site, has recently been sold and it is understood that the Willoughby Joint Regional Planning Panel have approved a mixed use development at the site. A retail component is planned to be provided, including a 1,198 sq.m Choice First Choice Liquor store and 1,466 sq.m of restaurant floorspace and 2,132 sq.m of retail specialty floorspace. It is understood that Wesfarmers (owner of Coles) have now purchased the site.
- xii. Given the existing uses that occupy retail zoned sites, any development within the Willoughby municipality and in particular, the Chatswood CBA, would likely need to be a mixed use development, incorporating a range of uses, in order to generate the income needed to make a development viable. However, given the current economic climate, even mixed-use developments are becoming more difficult. An example of this is the Chatswood Transport Interchange project, with the original owners becoming bankrupt. Chatswood Transport Interchange is proposed to include a Woolworths supermarket as part of a retail component. This store will serve a

different catchment to the proposed Chatswood East store, as the development will not include carparking and will predominately serve commuters.

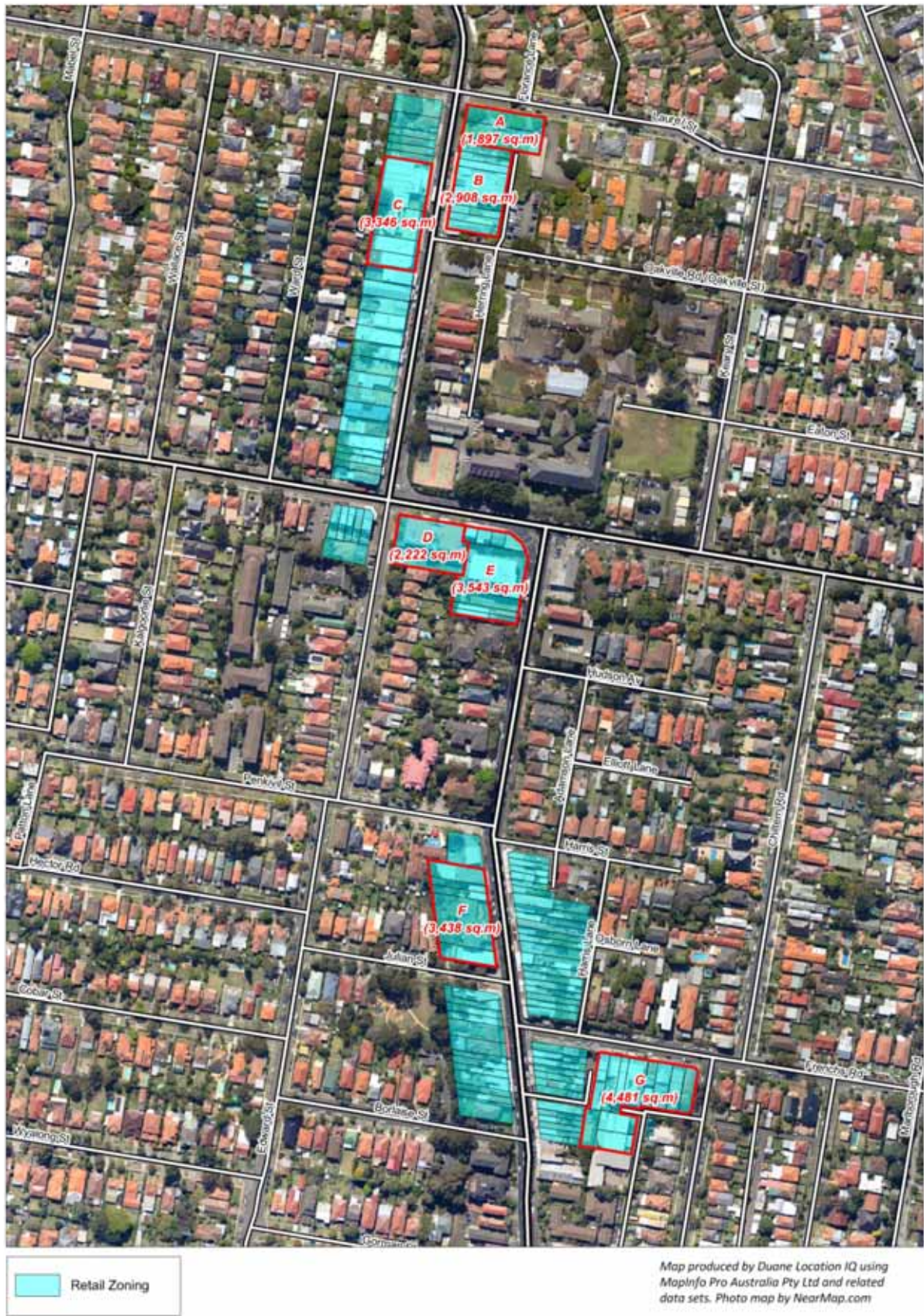
FIGURE 3.3 – CHATSWOOD CBA



3.4 Penshurst Street, Willoughby

- i. Penshurst Street in Willoughby forms a major retail strip and precinct within the Willoughby LGA. The Penshurst Street, Willoughby precinct is generally focused around Penshurst Street and Willoughby Road and is bounded to the north by Laurel Street and to the south by Borlaise Street.
- ii. The area zoned 3(a) General Business within the Penshurst Street, Willoughby precinct is illustrated in Figure 3.4.
- iii. The provision of facilities along Penshurst Street is primarily convenience focused, however also includes a range of bulky goods and showroom facilities. In total some 120 tenants are estimated to be provided.
- iv. Key sites that could potentially incorporate supermarkets within the area are outlined on Figure 3.4. However, full-line supermarkets are unviable for a number of reason including:
 - Small land size, with each less than 4,500 sq.m in size.
 - Each block includes several land parcels and various owners. The largest being Block A, incorporating 11 land parcels.
 - Each of the identified Blocks also include significant land uses including parkland, single and two storey retail developments, three storey residential and substantial office facilities.

FIGURE 3.4 – PENSURST STREET, WILLOUGHBY



3.5 Pacific Highway, Artarmon

- i. The Pacific Highway precinct in Artarmon is generally bounded by Gordon Avenue to the north and Mowbray Road to the south.
- ii. This precinct is zoned 3(b) Special Business and is illustrated in Figure 3.5. Given the limited size of retail zoned land within the precinct, there is really only one parcel that could potentially support additional supermarket floorspace, namely Block A, bounded by Moriarty Road to the north, Pacific Highway to the east and Mowbray Road to the south.
- iii. Key points to note regarding Block A include:
 - The site incorporates 9,368 sq.m of land, however, incorporates five different land parcels which would need to be acquired and consolidated.
 - A supermarket could potentially be incorporated across at least two of the land parcels, however, each of these blocks include substantial usages including:
 - o Two level hotel.
 - o Six level retail and commercial development.
 - o Two level office/retail facility.
 - o Two level retail facilities.
 - o Five storey residential facility, including ground floor retail.
 - o Service station.
- iv. Given the substantial usages, including high density development, various land owners and land parcels within this precinct, any supermarket development would be unviable.

FIGURE 3.5 – PACIFIC HIGHWAY, ARTARMON



3.6 St Leonards

- i. Figure 3.6 outlines the areas zoned 3(a) General Business within the St Leonards precinct. Some limited retail facilities are also provided along Chandos Street, St Leonards, however, this precinct is zoned 3(e) Restricted Office.
- ii. The majority of traditional retail zoned land is focused around the St Leonards railway station.
- iii. The Forum at St Leonards incorporates a Coles Central supermarket as well as a large provision of retail specialty floorspace. Retail floorspace totals some 5,000 sq.m. The centre forms a mixed use development above the St Leonards railway station and also includes office and residential facilities.
- iv. As indicated on Figure 3.6, the only site that would potentially be large enough to accommodate a full-line supermarket within this precinct is Block A, immediately west of The Forum and south of the Royal North Shore Hospital.
- v. Key points to note regarding Block A include:
 - The site occupies some 6,921 sq.m.
 - Existing uses at the site include two large developments, predominantly for commercial offices, however, also including ground floor retailing. The two buildings are modern developments occupying seven and ten storeys.
 - As the site is currently built up and with high density development, it is unlikely that the site could form a viable supermarket option.
- vi. It is understood that the land immediately north of Block A, currently owned by the Royal North Shore Hospital may be sold in the future to accommodate a range of commercial, retail and residential uses. While a supermarket may form part of a mixed use development at the site in the future, this development will be a number of years away.

- vii. In addition, the St Leonard's precinct is situated some 5.5 km south of the proposed Chatswood East site and is separated from the northern areas of Willoughby by the Gore Hill Freeway/Lane Cove Tunnel. Importantly, any supermarket development at this location would not service residents within Chatswood, where there is overwhelming need now.

FIGURE 3.6 – ST LEONARDS



3.7 Artarmon

- i. Immediately adjoining the Artarmon industrial precinct, fronting the Pacific Highway, are a number of land parcels zoned 3(b) Special Business. This land is illustrated on Figure 3.7.
- ii. It is our view that there are three blocks that may support a supermarket development. Key points regarding these blocks include:
 - Block A totals some 4,218 sq.m and includes 5 lots. This block is likely to be too small to support a substantial supermarket development. In addition, the block is occupied by a car dealership, two and three storey office buildings and a Golf Mart retailer.
 - Block B totals some 6,048 sq.m (across 6 lots), with existing uses including a motorbike showroom, Mazda dealership, a two storey office and retail building as well as a large Officeworks retailer.
 - Block C totals some 7,038 sq.m. This block incorporates eight lots and is occupied by a modern, three level Storage Works development as well as four storey Honda showroom and office.
- iii. Block A is less than 4,500 sq.m and as such would be difficult to successfully accommodate a supermarket at this location.
- iv. Each block, while being large enough in size to potentially incorporate a supermarket, include substantial existing usages and could not easily be replaced or consolidated. As such, a viable supermarket development could not be provided at these locations.
- v. These blocks are currently being used as showrooms, offices and retail facilities that benefit from the Pacific Highway location on the periphery of an industrial precinct.

- vi. Further, this area serves a different market to the proposed Chatswood East site, with local residents in this area more focused on supermarkets at Lane Cove, situated some 1.5 km west, while the Chatswood East site is located over 5 km away.

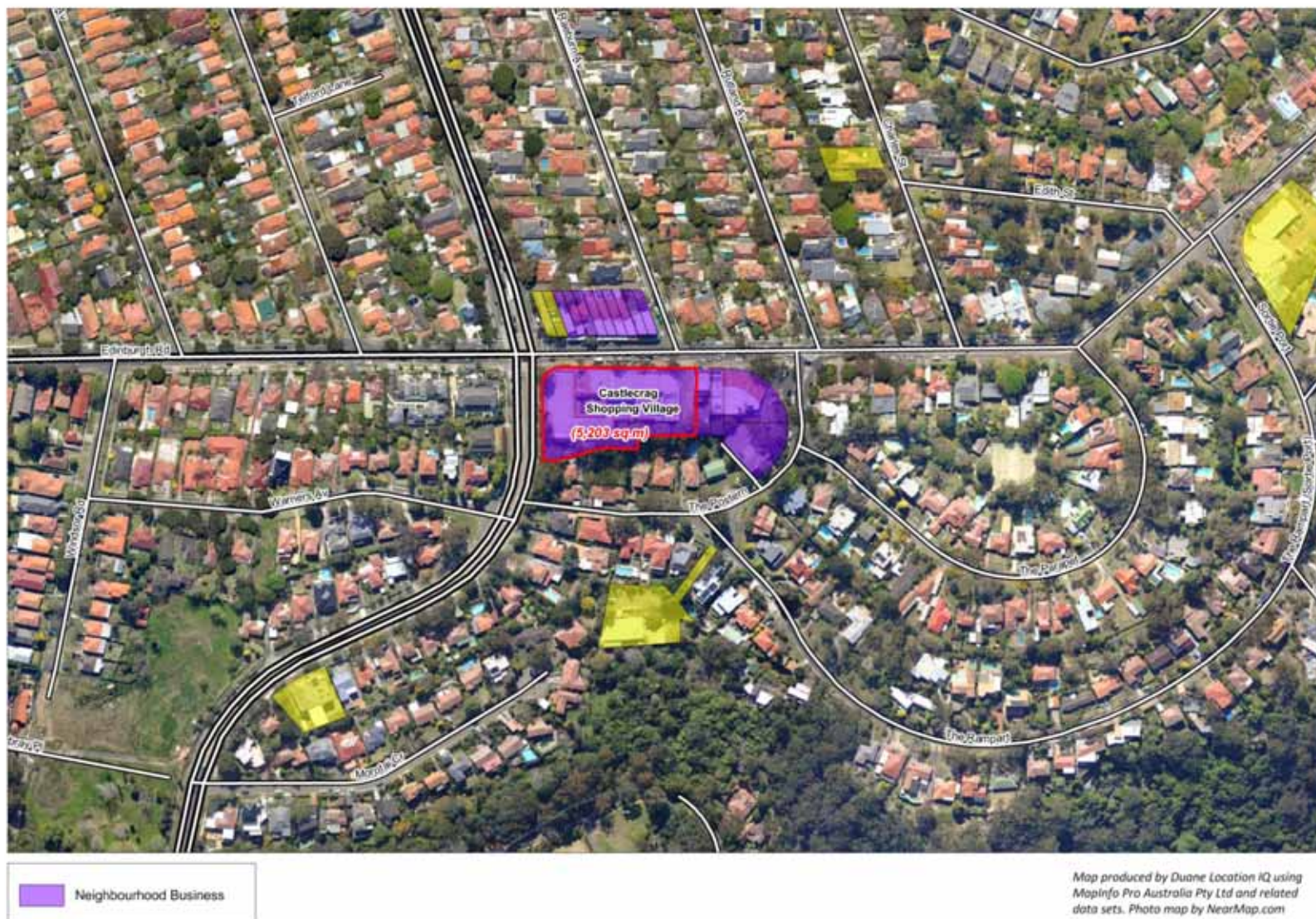
FIGURE 3.7 - ARTARMON



3.8 Castlecrag

- i. Castlecrag precinct incorporates the only other major supermarket within the defined Willoughby LGA, namely a Coles Central supermarket at Castlecrag Shopping Village. The centre is provided at the intersection of Edinburgh Road and Eastern Valley Way and also includes some 16 specialty tenants.
- ii. The Castlecrag precinct is zoned 3(d) Neighbourhood Business as indicated on Figure 3.8.
- iii. There is a very limited provision of available land within Castlecrag, with the existing Castlecrag Shopping Village providing the only major site. As stated, this centre includes a supermarket and supporting specialty stores, serving a convenience food and grocery role within the local area.
- iv. Given the existing uses and limited provision of land available, it is unlikely additional supermarket floorspace could be supported at the site.

FIGURE 3.8 – CASTLECRAIG



3.9 Summary

- i. It can be seen that there is a very limited supply of suitable, larger size blocks within Willoughby that could potentially accommodate an additional supermarket centre.
- ii. In the few instances where a supermarket development could possibly occur at some stage in the future, these locations serve different markets to the proposed Chatswood East site and would provide no benefit to the local residents within the Chatswood East trade area.
- iii. Council identified three specific examples for future supermarket floorspace within Willoughby including:
 - *Council has approved a supermarket (Woolworths) adjoining the Chatswood Interchange;*
 - *The Royal North Shore Hospital Divestment lands at St Leonards.*
 - *Redevelopment and expansion of the Northbridge Plaza Woolworths.*
- iv. In reference to the above locations we make the following key comments:
 - The identified sites are all located more than 2 km from the proposed Chatswood East site. In particular, St Leonards and Artarmon are located more than 5 km from Chatswood East and are separated by the Gore Hill Freeway/Lane Cove Tunnel, while Northbridge is located 3.6 km from the Chatswood East site. As such, any supermarket development at these locations will effectively serve a different market and catchment to the proposed Chatswood East site.
 - Each of the identified sites are provided within areas that are already serviced by existing nearby supermarkets.
 - The Chatswood Interchange supermarket will not adequately serve residents of Chatswood East, as it will not provide a full-line supermarket offer or any carparking facilities. This supermarket will primarily serve commuters and not Chatswood East residents.

- As addressed previously, an expansion of Northbridge Plaza has been proposed by AMP on a number of occasions, however, has not been supported by Council.

4 KEY FINDINGS

- i. The several key issues that Council raised with reference to a proposed supermarket at Smith Street in Chatswood East included:
 - *“Council has consistently strived to maintain the supply of existing industrial land particularly for service industry in the LGA and subregion.”*
 - *“There are other opportunities for supermarket development in Willoughby including:*
 - o *Council has approved a supermarket (Woolworths) adjoining the Chatswood Interchange;*
 - o *The Royal North Shore Hospital Divestment lands at St Leonards.*
 - o *Redevelopment and expansion of the Northbridge Plaza Woolworths.”*
 - *“The Smith St proposal would not satisfy the ‘net community benefit test’ under the draft Centres policy due to ... the likely impact on the economic viability of strip centres at High St Markets and Penshurst St/Victoria Avenue.”*
- ii. Each of these issues has been addressed within the report, including:
 - *Council has consistently strived to maintain the supply of existing industrial land particularly for service industry in the LGA and subregion.*
 - o The usage of all industrial zoned land within Chatswood East for industrial purposes no longer represents the optimal use for employment generation within this precinct, demonstrated by the large number of vacancies.
 - o There is an ongoing shift of facilities within Chatswood East to alternative uses including smaller office, showroom/bulky goods and retail facilities. This is reflected in the development of a new Bunning’s Warehouse immediately opposite the proposed supermarket site.

- o High level of vacancies within Chatswood East indicates the fact that this precinct is no longer successful focusing solely on traditional industrial uses, particularly as compared with the lower vacancy levels within Artarmon.
 - o Chatswood East does not receive as much access to major roads and public transport as compared with Artarmon which is situated along the Pacific Highway and in close proximity to the railway line.
 - o The proposed Chatswood East supermarket site occupies only a small proportion of industrial land (4,389 sq.m out of 264,456 sq.m) and will provide more jobs in a single development than the projected growth in the total Chatswood East precinct based on the Travel Zone Employment Forecasts prepared by the New South Wales Department of Transport and Infrastructure.
 - o The proposed supermarket would assist in the rejuvenation of the Chatswood East precinct which would help to limit vacancies and increase Chatswood East as a major employment destination.
 - o Development of a supermarket would provide additional jobs to the local community as compared with an industrial development on the site. Council can continue to provide substantial employment within Chatswood East through a greater diversity of uses.
 - o Chatswood East includes a substantial surrounding population who demand access to convenient and affordable food and grocery facilities locally instead of travelling to full-line supermarkets within the Chatswood CBA and Northbridge.
- *There are other opportunities for supermarket development in Willoughby.*
- o As demonstrated in Section 3 of this report, there are no viable sites for a supermarket in close proximity to Chatswood East that include

adequately zoned land or are large enough to adequately support a full-line supermarket.

- o Possible existing sites already have current uses, including a number of higher density developments such as mixed use developments, commercial office, retail and residential structures.
 - o A number of lots would need to be consolidated in order to establish a supermarket. This would lead to increased costs of development and would render a supermarket development unviable.
 - o Due to the price of consolidation and development, it is likely that a mixed use development, incorporating the supermarket, would need to be provided in order to make any development economically viable. These types of developments are increasingly difficult in the current economic environment.
 - o Larger sites or sites that are more likely to accommodate a supermarket are situated some distance from Chatswood East and are already served by existing supermarkets. As such, the undersupply of supermarket floorspace for Chatswood East residents would continue to present an issue.
 - o In conclusion, there are no suitable sites in Chatswood that could accommodate a full-line supermarket.
- *The Smith St proposal would not satisfy the ‘net community benefit test’ under the draft Centres policy due to ... the likely impact on the economic viability of strip centres at High St Markets and Penshurst St/Victoria Avenue.*
- o Surrounding residents using the local facilities will continue to travel to the Chatswood CBA or surrounding facilities such as Northbridge for their full-line supermarket shop. Development of the Chatswood East

supermarket site would provide a full-line supermarket offer to surrounding residents in close proximity to their homes.

- o The proposed Chatswood East supermarket would compete more directly with surrounding large format supermarkets within the region such as supermarkets within the Chatswood CBA and Northbridge.
- o Only the nearby food and grocery operators may be impacted by the proposed Chatswood East supermarket development, as the proposed development will not include any supporting specialty stores. Based on a floorspace survey undertaken by this office in May 2010, some 25% of the 16 tenants within the High Street Markets are food and grocery operators, while only 7.1% of the 84 tenants provided within the Penshurst Street, Victoria Avenue precinct are food and grocery traders. This indicates the limited number of traders that may be impacted by the proposed Chatswood East supermarket development.
- o Furthermore, the High Street Market, Penshurst Street and Victoria Avenue precincts are all situated around 1 km or more from the proposed Smith Street site.
- o As demonstrated in the previous May 2010 economic impact report, the likely impact of the proposed Smith Street supermarket on surrounding retail facilities at High Street Markets and Penshurst/Victoria Avenue would be limited. Furthermore, the projected impact on High Street Markets and Penshurst Street/Victoria Avenue would be in the order of 5% and therefore, well within the normal competitive range of less than 10%.
- o Retail facilities within each of these precincts are smaller in size and serve the retail needs of the local population. These precincts do not include full-line supermarkets and as such, the proposed Chatswood East store would effectively serve a different role in the hierarchy. A proposed

supermarket at Chatswood East is not proposed to include any supporting retail specialty stores and therefore, would serve the weekly food and grocery needs of the region, and provide an affordable food and grocery option for surrounding residents in close proximity to their homes.

- o The retail traders within High Street Markets and Penshurst Street/Victoria Avenue will continue to be viable and will not be impacted to any significant degree by the proposed supermarket development.
- iii. The development of the proposed Woolworths supermarket at Chatswood East would increase employment within this area of the Willoughby municipality. In addition, the development would increase customer flows and therefore, increase the viability of surrounding retailers and facilities within Chatswood East.
- iv. No other suitable sites are available for supermarket development within the Willoughby municipality, while the Chatswood East site provides a suitably sized site for a supermarket development with a single owner.
- v. Retail sites that could potentially accommodate supermarkets within the Willoughby LGA are constrained by significant issues such as multiple site ownership and/or existing uses which would need to be relocated/acquired. The cost to acquire, consolidate and relocate/acquire existing businesses effectively makes the site financially unviable. Consequently, these sites cannot be relied upon to deliver the appropriate supermarket floorspace to ensure a convenient and competitive environment.
- vi. Development of the supermarket at the Chatswood East site would be consistent with the shift of uses in Chatswood East away from the warehouse/industrial facilities to other employment uses such as showrooms/bulky goods and retail facilities.
- vii. The impact of the proposed supermarket at Chatswood East on surrounding retail facilities would be minimal, while a number of substantial positive benefits would result for the surrounding community including:

- Additional employment opportunities.
- Additional choice and price competition.
- Reduction in travel times and fuel costs.

APPENDIX 1

TABLE 1 – CHATSWOOD EAST INDUSTRIAL PRECINCT COMPOSITION

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
1	3,034	<u>No. 3 Warrah Street</u>	Office/Warehouse/Industrial	3	Average
		1 Customers ATM			
		2 Pelactiv			
		3 Accent International Tapware			
		4 TRT Total RISC Technology			
		5 Trilliance			
		6 San-AI Trading			
		7 Star Line			
2	830	Envirolab Services Pty Ltd	Office	2	Above Average
3	4,225	<u>No. 328 High Street</u>	Office	2	Average
		1 GEA Process Engineering/GEA Colby			
		2 Living Edge Rentals			
		3 XSI Data Solutions			
4	884	<u>No. 314 High Street</u>	Office/Warehouse/Industrial	1	Average
		1 Lulu's Dressing Table			
		2 Sydney String Centre			
5	873	<u>No. 312A High Street</u>	Office/Warehouse/Industrial	1	Average
		1 Wardrobe Costume Hire			
		2 VACANT (400 sq.m)			
6	1,649	<u>No. 312 High Street</u>	Office/Warehouse/Industrial	1	Average
		1 North Shore Radiators			
		2 Hip Infant			
		3 K-Tech Solutions			
		4 Power Sense			
		5 Plumbing Services			
		6 Top Gear Automotive			
		7 Storage (North Shore Radiators)			
7	3,906	Lexus/Citroen Service Centre	Automotive/Warehouse	2	Average
8	4,076	<u>No. 12 Barcoo Street</u>	Automotive/Warehouse	2	Average
		1 Alfa Romeo/FIAT/Hyundai Service Centre			
		2 VACANT (2,366 sq.m)			
9	3,256	<u>No. 20 Barcoo Street</u>	Office/Warehouse/Industrial	3	Average
		1 CST Waste Water Solutions			
		2 Robert Blau			
		3 VACANT (228 sq.m)			
		4 VACANT (250 sq.m)			
		5 Blue Gum Plumbing			
		6 VACANT (250 sq.m)			
		7 United Campus Bookshop			
		8 Somerville			
		9 Buggy Man			
		10 Emerald Electrical			
		11 Unknown Tenant			
		12 Barter Card			
		13 Your Home Works			
		14 Interface Tech			
		15 Unknown Tenant			

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
10	21,371	Northlight	Office/Warehouse/Industrial	2	Above Average
		1 Enviro Pacific			
		2 Unknown Tenant			
		3 Unknown Tenant			
		4 VACANT (188 sq.m)			
		5 Transition Systems			
		6 Unknown Tenant			
		7 Unknown Tenant			
		8 Penmara			
		9 Floristry Tools, Tools for Professionals			
		10 Projection Management			
		11 GPM Constructions			
		12 Demand Group			
		13 VACANT (287 sq.m)			
		14 Silver Spoon Caterers			
		15 Pool Doctor			
		16 Simmons Civil Engineering			
		17 VACANT (287 sq.m)			
		18 Commercial Kitchen Appliances			
		19 RJG Constructions			
		20 Unknown Tenant			
		21 Ecomist			
		22 Unknown Tenant			
		23 Tools and Trade, Beta			
		24 VACANT (200 sq.m)			
		25 Unknown Tenant			
		26 Unknown Tenant			
		27 Unknown Tenant			
		28 Scene to Believe			
		29 NDC			
		30 Unknown Tenant			
		31 Bean Me Up Café			
		32 Sirona, the Dental Company			
		33 ACS Supplies			
		34 KJ Studio			
		35 Universal Film Service			
		36 Air Doctor			
		37 Alphabond			
		38 Unknown Tenant			
		39 Burnaid			
		40 Unknown Tenant			
		41 Extended Sampling and Promotion			
		42 Musco Lighting			
		43 CAN Agencies			
		44 VACANT (188 sq.m)			
		45 Divine Events			
		46 Headstart Early Learning Centre			
		47 Wenger			
		48 Crafters Hub			
		49 Sibnet Electronics			

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
11 & 12	3,523	<u>Roseville Business Precinct</u> 1 Michigan Avenue 2 Auto Shop 3 Car Sales Elite 4 Chartered Accountant VACANT * 21 (98-850 sq.m)	Office/Warehouse/Industrial	3	Above Average
13	3,723	<u>Chase Business Park</u> 1 Flovac 2 VT-1 Gym 3 Hal Group 4 Gartner Rose 5 VACANT (621 sq.m) 6 EDSYS Offices 7 VACANT (607 sq.m) 8 Sharp Directors 9 Centrica's 10 VACANT (770 sq.m)	Office/Warehouse/Industrial	3	Average
14	5,217	Carpark			
15	1,506	VACANT			
16, 19, 20	11,411	<u>Chatswood Business Park</u> 1 Bedding 2 Rapee 3 McCursey's 4 Timber Floor Plus 5 SPS Roof and Floor Drains 6 Permanent Press 7 Rose-Hip Vital 8 Unknown Tenant 9 Unknown Tenant 10 ASE IT 11 Omni-Quant 12 Howard Silver & Sons and Synergy Merchandising 13 Dataline Group 14 VACANT (135 sq.m) 15 VACANT (140 sq.m) 16 Wall to Wall Computer Services 17 Contact & Clarendon Printing 18 Samuelson's Cases	Office/Warehouse/Industrial	2	Average
17	4,077	<u>384 Eastern Valley Way</u> 1 Trend Windows and Doors 2 Strata Self-Storage 3 Compass Resources 4 OTEC Environmental and Engineering 5 Afloat Publications	Office/Warehouse/Industrial	5	Above Average
18	2,693	North Shore Christian Centre	Church/Community Centre	4	Average

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
21	11,209	<u>No. 380 Eastern Valley Way</u>	Office/Warehouse/Industrial	2	Average
		1 Jun Pacific			
		2 Fusion Blinds			
		3 Patchwork Communications			
		4 X Central			
		5 Eastern Valley Automotive			
		6 Hair Health Beauty			
		7 Software Publications			
		8 JW Corporate Uniforms			
		9 Unknown Tenant			
		10 Micro View			
		11 Unknown Tenant			
		12 Clarke Murphy Print			
		13 Signarama			
		14 VACANT (150 sq.m)			
		15 PMS Print Media Services			
		16 CR Group Australia			
		17 Lighting Group			
		18 Synteko For Floors			
		19 All Plastics Engineering and Building			
		20 Scuba Pro			
		21 Church in Sydney Meeting Hall			
		22 Direct Alarm Supplies			
		23 ARJO Wiggins Paper			
		24 Micro Electronic Office Equipment			
22 & 23	818	Curtain Factory	Bulky Goods	1	Average
24 - 26	10,704	<u>No. 372 Eastern Valley Way</u>	Bulky Goods/Office	2	Above Average
		1 Pet Barn			
		2 VACANT (541 sq.m)			
		3 VACANT (541 sq.m)			
		4 Print Associates			
		5 Wizzy World, Party/Play Centre			
		6 Carillon Graphics Communications			
		7 The Good Guys			
		8 Fats Digital			
27, 28, 32	10,253	Bunnings (u/c)	Bulky Goods	2	Above Average
29	651	Prius	Office	3	Average
30	2,048	NRMA Insurance Care and Re	Automotive/Warehouse	2	Average
31	165	Electrical Substation	Utility		
33	6,343	Cavalier Bremworth	Office/Warehouse/Industrial	2	Average
34	4,389	VACANT			
35	764	Prime Car Services	Automotive	2	Average
36	4,227	<u>No. 70 Gibbes Street</u>	Office/Warehouse/Industrial	1 & 2	Average
		1 Flame Stop			
		2 VACANT (1,375 sq.m)			

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
37	5,324	No. 72-74 Gibbes Street	Office/Warehouse/Industrial	2	Average
		1 Wine-Ark			
		2 Gripwell Australia			
		3 Epicentre Trading Pty Ltd			
		4 Cojo			
		5 Dobsons Printing			
		6 Avopiling Drilling Contractors			
		7 Meiko Commercial Dishwashers			
38	9,346	No. 331 High Street	Office/Warehouse/Industrial	2	Average
		1 BICO Australia (unit for sale)			
		2 Horizon			
		3 Serigraphics			
		4 Takai Australia			
		5 The Salad Servers			
		6 S&B Gourmet Foods			
		7 Party Time Hire			
		8 NAIDA			
		9 Packovation			
		10 G&K Printing			
		11 K&D Plastics			
		12 Classic Handbags			
		13 Match It Electronics			
		14 Attic Conversions Centre			
		15 Allaw			
		16 Heron Security and Sport			
		17 BACS IT Protection			
		18 TEG			
		19 Willoughby Glass			
		20 Office National			
		21 Unknown Tenant			
		22 Unknown Tenant			
		23 Quadtec Laser Technology			
		24 Prestige Pool Fencing			
		25 David Leisk Electronics			
		26 Unknown Tenant			
		27 Bar House			
		28 VACANT (200 sq.m)			
		29 Swimaster			
		30 Bartlett Plumbing Services			
39	1,318	Cutting Services	Office/Warehouse/Industrial	1	Average
40	763	No. 329 High Street	Office/Warehouse/Industrial	2	Average
		1 Dickson's Music Complex			
		2 VACANT (412 sq.m)			
41 & 43	1,209	Façade Innovations	Office	2	Below Average
42	450	Killara Rose Bay Plumbing	Office/Warehouse/Industrial	1	Below Average
44	302	Vetfriends	Vet	2	Average
45	299	Straight Steer Automotive W	Automotive	2	Average
46	303	PQ Automotive	Automotive	2	Average

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
47	309	Go Gardening Landscape	Office/Warehouse/Industrial	2	Average
48	604	Valet Solutions and Smarter I	Office	1	Average
49	607	<u>No. 13-15 Smith Street</u> 1 Field Force 2 VACANT (997 sq.m)	Office/Warehouse/Industrial	2	Average
50 & 51	939	VACANT	Office/Showroom/Warehouse	3	Above Average
52	900	Electronic Development Sale	Office	2	Average
53	662	Reece Plumbing	Office/Warehouse/Industrial	1	Average
54	894	<u>No. 66 Gibbes Street</u> 1 Coursemaster Autopilots 2 New Holland Publishers	Office/Warehouse/Industrial	2	Average
55	816	<u>No. 61 Alleyne Street</u> 1 JL Desired Living 2 Studio 61	Office/Warehouse/Industrial	2	Average
56	908	Paparazzi Studios	Warehouse/Industrial	2	Average
57	792	ORSO	Office/Warehouse/Industrial	2	Above Average
58	500	North Shore Automotive Trar	Automotive	1	Average
59	1,744	<u>No. 52 Gibbes Street</u> 1 Medical Specialties Australia 2 Integrated Sciences	Office/Warehouse/Industrial	2 & 3	Average
60	999	Living Edge Furniture Rental	Bulky Goods	2	Above Average
61	3,334	Storage King Chatswood	Storage	1	Above Average
62 & 63	1,596	<u>No. 33-35 Alleyne Street</u> 1 Austech Laboratories 2 VACANT (650 sq.m) 3 Image Design Technology 4 Access Communications 5 Phonetronics 6 Ansa-Tel Electronics Servicing	Office/Warehouse/Industrial	2	Average
64	6,307	Kennards Self Storage	Storage	1	Above Average
65	1,149	<u>No. 18 Smith Street</u> 1 Party Services 2 Hopwood Miller 3 Bertram Printing 4 Business for Charity 5 Gecko Print 6 Rapid Print Solutions 7 VMS Micro Planet Office 8 Vogue Catering	Office	2	Above Average
66	687	Michelin Tyres	Automotive	1	Average
67	2,543	North Shore Timber and Harc	Bulky Goods	1	Above Average
68	5,645	Unknown Tenant	Office	5	Average

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
69	7,669	<u>No. 28 Smith Street</u>	Office/Warehouse/Industrial	1	Average
		1 VACANT (355 sq.m)			
		2 Acclaim Office Furniture			
		3 Xintronics			
		4 Plasta Masta			
		5 VACANT (350 sq.m)			
		6 Silicon Memory Technologies			
		7 Northern Suburbs Party Hire			
		8 Magna Systems and Engineers			
		9 Open Door Korean Cultural Society & Church			
70	1,563	<u>No. 368-370 Eastern Valley Way</u>	Retail/Gym/Automotive	3	Average
		1 Subway			
		2 Elite Fitness Equipment			
		3 Beaurepaires			
71 & 72	1,560	Caltex/Woolworths Petrol Sta			
73	6,723	<u>No. 358 Eastern Valley Way</u>	Office/Showroom/Warehouse	1, 2 & 3	Average
		1 Mister Carpet			
		2 Guest's Furniture Hire			
		3 TCN9			
		4 Ep & T Life Fitness			
		5 Ikin Dance			
		6 VACANT Building (500 sq.m)			
74	7,424	<u>No. 29-35 Gibbes Street</u>	Office/Warehouse/Industrial	3	Average
		1 Kawai Australia			
		2 Nottage International			
		4 Syntec International			
		5 Robot Coupe Australia			
		6 Nicky's Kid Town			
		7 Airdraulic Birco Group			
		8 Pride Built In Wardrobes and Shower Screens			
		9 Txet			
		10 Australian Pharmaceuticals			
		12 Hordern and Company			
75 & 77	7,164	<u>No. 25 Gibbes Street</u>	Office/Warehouse/Industrial	2	Above Average
		1 VACANT (226 sq.m)			
		2 Unknown Tenant			
		3 Industry Café			
		4 Unknown Tenant			
		5 VACANT (173 sq.m)			
		6 VACANT (168 sq.m)			
		7 VACANT (169 sq.m)			
		8 VACANT (169 sq.m)			
		9 Unknown Tenant			
		10 Unknown Tenant			
		11 VACANT (254 sq.m)			
		12 VACANT (198 sq.m)			
		13 Unknown Tenant			
		14 Unknown Tenant			
		15 VACANT (205 sq.m)			
		16 VACANT (203 sq.m)			
		17 VACANT (198 sq.m)			
		18 VACANT (198 sq.m)			
		19 VACANT (367 sq.m)			
		20 Willoughby Council Depot (lower level)			

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
76	3,000	<u>No. 15-21 Gibbes Street</u>	Office/Warehouse/Industrial	2	Above Average
		1 Sustainable Water			
		2 Australian Medical and Scientific Limited			
		3 Atlantis			
		4 VACANT (170 sq.m)			
		5 Mondottica			
		6 Scanmedics			
		7 Unknown Tenant			
		8 Rapid Machinery Company			
78	4,808	<u>Niche - 354 Eastern Valley W:</u>	Office/Industrial	4 & 5	Above Average
		1 ADI Global Distribution			
		2 Chatswood Appliances and Spare Parts			
		3 VACANT (199 sq.m)			
		4 VACANT (149 sq.m)			
		5 9289.com.au			
		6 VACANT (71 sq.m)			
		7 Yakka Build			
		8 Save on Bathrooms			
		9 Solar Tube			
		10 Bioclip			
		11 Finsbury Orthopaedics			
		12 OAS Technology Group			
		13 CDS Security			
		14 DJF Productions			
		15 VACANT (150 sq.m)			
		16 Elevator Services Group			
		17 Aurum Australia			
		18 JA Courtney Electrical			
		19 VACANT (200 sq.m)			
		20 Foodstuff Australia			
		21 Kenyon International and Caretaker			
		22 VACANT (135 sq.m)			
		23 Niche Foods Café			
		24 Middle Harbour Electrical			
		25 Tech Troops			
		26 Magaldi			
		27 CARM Training			
		28 Passmore Duff			
		29 Biz Fone			
		30 Billy Kids Early Learning Centre			
		31 Cougar Office			
79	618	Automotive Repairs	Automotive	2	Average
80	6,500	Fitness First Platinum	Gym	2	Above Average
81	1,299	Unknown Tenant	Office	2	Above Average
82	727	Legends Under Glass	Office	2	Average

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
83	849	Karl Knudsen Automotive	Automotive	1	Average
84	1,324	<u>No. 9 Gibbes Street</u> 1 Yarhamville 2 Pharmacy Workshops 3 VACANT (224 sq.m) 4 Property Enrichments	Office	1	Average
85	7,454	<u>McCabe Estate</u> 1 Electroboard 2 Unknown Tenant 3 Unknown Tenant 4 HBC Trading Australia 5 Field Force Services 6 Unknown Tenant 7 The Bridge Networks 8 Unknown Tenant 9 VACANT (1,266 sq.m)	Office/Warehouse/Industrial	4	Average
86	937	Silk Studios	Office	2 & 3	Average
87	2,939	Teleflex	Office/Warehouse/Industrial	1 & 2	Average
88	1,050	<u>No. 7A Gibbes Street</u> 1 Unistar Enterprises 2 StarTech Communications	Office	2	Average
89	726	<u>No. 5B Gibbes Street</u> 1 Sanyo 2 Billboard Connection 3 Signarama	Office/Warehouse/Industrial	1 & 2	Average
90	695	Bill's Board Factory	Office/Warehouse/Industrial	2	Average
91	1,174	Ramax Electrical Wholesaler	Office/Warehouse/Industrial	1 & 2	Average
92	2,557	<u>No. 3 Gibbes Street</u> 1 Sydney Extensions and Design 2 Lilly Industries 3 Exquiria 4 Tranter 5 Beautopia Hair 6 VACANT (250 sq.m) 7 Hybrex Telecom 8 Compucon Computers	Office/Warehouse/Industrial	2	Average
93	1,052	<u>No. 79A Victoria Avenue</u> 1 Chatswood Prestige 2 North Shore Auto Electrical & Air-conditioning Services 3 Pitstop Automotive	Office/Warehouse/Industrial	2	Average
94	1,067	Howthorn House	Office/Warehouse/Industrial	3	Below Average
95	3,613	Electrical Substation	Utility		
96	2,268	Northside Storage	Storage	1 & 2	Average

Key Site Attributes					
Block	Area (sq.m)	Tenant	Use	No. of Storeys	Condition of Building
97	1,425	<u>No. 8 McCabe Place</u>	Office/Warehouse/Industrial	2	Average
		1 On Demand 2 Rare Retail Solutions			
98	1,248	Duroflex	Office/Warehouse/Industrial	3	Average
99	1,109	Unknown Tenant	Office/Warehouse/Industrial	1	Below Average
100	1,012	Unknown Tenant	Office/Warehouse/Industrial	3 & 4	Average
101	1,048	<u>No. 2 McCabe Place</u>	Office	3	Average
		1 Yuncken			
		2 VACANT (250 sq.m)			
		3 VACANT (250 sq.m)			
102	1,357	<u>108 Warrane Road</u>	Office	3	Average
		1 VACANT (150 sq.m)			
		2 Bowen Island Bakery & Café			
		3 VACANT (280 sq.m)			
		4 Tech Sound			
		5 Kwik Kopy Printing Chatswood			
		6 Commercial Printers			
		7 Sabre Diecutting			
		8 Stylecraft Painting Services			
103	722	John Morris Scientific Pty Ltd	Office	3	Above Average
104	703	ICS International Conservatio	Office	2	Average

TABLE 2 – ARTARMON INDUSTRIAL PRECINCT COMPOSITION

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
1	13,054	<u>Altona Place</u> 1 Audi dealership and service centre 2 Carpark 3 Ford dealership	Automotive/Carpark
2	1,509	<u>No. 55 Hotham Pde</u> 1 North Shore Collision Centre 2 Café	Automotive
3	6,095	<u>No. 49-53 Hotham Pde</u> 1 Computershare 2 BMW North Shore	Office/Automotive
4	2,646	VACANT	
5	4,846	Volkswagen	Office/Automotive
6	1,617	Mercedes Benz	Office/Automotive
7	2,531	<u>No. 39 Hotham Pde</u> 1 Cremorne Prestige Services 2 Scuderia Imports 3 VACANT (518 sq.m)	Office/Automotive
8	1,881	Unknown Tenant	Office/Warehouse/Industrial
9	2,019	Willoughby Council Services	Office/Warehouse/Industrial
10	4,731	<u>No. 6-8 McLachlan Ave</u> 1 Artarmon Bar & Grill 2 R Hogan & Sons Printing 3 Form One Protection 4 Multi RIT 5 VACANT (170 sq.m) 6 Integrity Strength Systems 7 Flexi Group 8 AN Relocations 9 Promax 10 Displays to Go 11 VACANT (170 sq.m)	Office/Warehouse/Industrial
11	2,269	<u>No. 10 McLachlan Ave</u> 1 Rallyspeed 2 North Shore Power Coating	Automotive/Warehouse
12	9,636	Holcim Artarmon Concrete Plai	
13	5,396	Chatswood Toyota, Parts and S	Office/Automotive
14, 15 & 16	42,299	Weir Minerals Australia	Office/Warehouse/Industrial
17	7,456	ARB North Side Automotive Re	Automotive
18 & 19	4,541	Weir Minerals Australia	Office/Warehouse/Industrial

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
20	13,168	<u>Hotham Pde</u>	Office/Warehouse/Industrial
		1 Stowe Smash Repairs	
		2 Seddon and De Welles	
		3 VACANT (1,655 sq.m)	
		4 The Barn Office Furniture	
		5 Elle Bache, Hallas Trading	
		6 Gowa Foods	
		7 Flavours Catering and Events	
		8 Major Trading	
		9 Trinity 3 Productions/James Latta	
		10 Bridgestone	
		11 Defcon Technologies	
		12 Pacific Dynamics	
		13 Oxley and Alloy Pro	
		14 Kayell Australia	
		15 Carcraft Smash Repairs	
21	28,919	<u>Hotham Pde</u>	Office/Warehouse/Industrial
		1 Atlas Motor Body Works	
		2 AGA Engineering	
		3 Tucker Box Café and Takeaway	
		4 Cotswold Furniture	
		5 Mannequin Hire and Sales	
		6 Auto Tech Smash Repairs	
		7 Sunscreen Window Tinting	
		8 Urban Work Stations	
		9 Automotive Gear Box Services	
		10 Arcus Auto Services	
		11 Sydney Sign	
		12 Pack N'Send	
		13 Ding-oes	
		14 North Shore BMW Parts	
		15 Comfortel	
		16 Australian Designer Jewellery	
		17 Concours Motor Body Repairs	
		18 North Shore Car Detailing	
		19 VACANT (303 sq.m)	
		20 Koudsy Body Works	
		21 Peps Auto Spares	
		22 Global College	
		23 Autolac Paint and Accessories	
		24 Moss Warehouse	
		25 Hotham Body Repairs	
		26 Litho Team Office and Master Printing	
		27 Sawlyala	
		28 Industrial building (u/c)	
		29 Sharp, Printing and Software Technology Centre	
		<u>Whiting Street</u>	Office/Warehouse/Industrial
		30 Marco's Café	
		31 IMO Carwash Australia	
		32 Tony Isgrove's Painting and Decorating Specialists	
		33 Atlantic Plumbing	
		34 Atlantic Plumbing and FMD	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
22	24,023	<u>Whiting Street cont.</u>	Office/Warehouse/Industrial
		35 Food Affaire, Caterers	
		36 VACANT (250 sq.m)	
		37 Stephen Todd Contractors	
		38 Can Print	
		39 Artarmon Picture Framing	
		40 Reef Digital Media	
		41 Medical & Optical Instruments Australia	
		42 JATI Teak	
		43 Hertz Car Rentals	
		44 Workshop Events	
		45 Subaru Service Centre	
		46 VACANT (374 sq.m)	
		47 VACANT (374 sq.m)	
		48 Artarmon Automotive	
		49 Electroplaters	
		50 Simply Sports Cars	
		51 VACANT (926 sq.m)	
		52 Prestige Auto Dent Removal	
		53 KW Armstrong Auto Repairs	
		54 Baresque	
		55 Don Horton Automotive	
		56 Mustang Australia	
		57 Marks and Willings Tyre Pro Shop	
		58 Ultra Tune Service Centre	
		59 Jones & Jones	
		60 F Payton & Son	
		61 Zeno's Gourmet Food	
		<u>Whiting Street</u>	
		1 Jack Hillerman's Smash Repairs	
		2 North Shore Windor Tinting	
		3 Sonny Tech	
		4 VACANT (400 sq.m)	
		5 Lyno's	
		6 CI Plus	
		7 Car Interior Plus	
		8 Alloy Stages, Hires, Installation and Sales	
		9 ANVA Auto Body Smash Repairs	
		10 POCG Sensor Technology	
		11 Lager Australia	
		12 DCSM Development Construction Facility Team Management	
		13 misfit.com.au	
		14 Unknown Tenant	
		15 Horizon Habitat Builders	
		16 Whispers	
		17 Active Hire	
		18 Kwik Kopy	
		19 VACANT (250 sq.m)	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
23	16,104	<u>Whiting Street cont.</u>	Office/Warehouse/Industrial
		20 Café Whiting	
		21 Mosarte	
		22 Designer Pots and Alfresco Furniture	
		23 VACANT (495 sq.m)	
		24 Hills Antenna and Accessories	
		25 Enlighten	
		26 Outback Track Tours	
		27 Jack's Automotive Electrical and Mechanical Repairs	
		28 Dynamic Office National	
		29 Kosta Vision	
		30 Concise Group	
		31 Lighting Direct	
		32 Artarmon Auto & Air Drillers	
		33 Instant Windscreens and Tinting	
		<u>Dickson Ave</u>	Office/Warehouse/Industrial
		34 GAP Lighting Designs	
		35 Murobond Paints	
		36 Jarvis Tubular Products	
		37 BAF - Furniture	
		38 Uni Gear	
		39 Baby Buds	
		40 Datatel Australia	
		41 Club Net	
		42 Andre's Party Hire	
		43 Microhire	
		44 Klarfeld Bronzes	
		45 VACANT (80 sq.m)	
		46 VACANT (1,675 sq.m)	
		47 NSW Fire Brigade Region North Office	
		48 Arrow Signs	
		49 North Shore Metal Recyclers	
		50 Sydney City Prestige Wholesale	
		<u>Dickson Ave</u>	Office/Warehouse/Industrial
		1 TWCA Motorsport	
		2 SanAI Trading	
		3 Amazing Clean Blinds	
		4 Baby Buds	
		5 Scene Change	
		6 Hot Water Maintenance	
		7 Action Australia	
		8 BCP Marketing Services	
		9 Antelope Engineering	
		10 Wizard Projects	
		11 Envisage Technology	
		12 Allied Industries	
		13 I.P Star Australia	
		14 Twitch Studios	
		15 INS Information Network Solutions	
		16 Protector Building Systems	
		17 Billy's Café	
		18 Havncab Real Estate Agent	
		19 Living Space Constructions	
		20 Mondittica Australia	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
24	17,577	<u>Dickson Ave cont.</u>	Office/Warehouse/Industrial
		21 Motomanchabra Studio 201	
		22 Cakes To You	
		23 Balloon Warehouse	
		24 Stationery Office Choice	
		25 MEME Australia	
		26 RECOM Corporate Communications	
		27 Barron GJM Laser Alignment	
		28 St Honore Office	
		29 globecast.com.au	
		30 VACANT (2,158 sq.m)	
		<u>Carlotta St</u>	Office/Warehouse/Industrial
		31 Hyundai dealership	
		32 Scott's Paint and Panel	
		33 VACANT (190 sq.m)	
		34 Classic Blue Solutions	
		35 Rose International Australia	
		36 Ageless Gardens	
		37 Oriental Continental Food Wholesalers	
		38 VACANT (250 sq.m)	
		39 VACANT (250 sq.m)	
		40 Kelly Fire Protection Services	
		41 E-induct	
		42 Vinitec	
		<u>Carlotta St</u>	Office/Warehouse/Industrial
		1 CRG	
		2 Goodies Café and Hot Food	
		3 North Point Auto Repairs	
		4 Wyvern Smash Repairs	
		5 JAI	
		6 Film World	
		7 Quad Services	
		8 Shoot Studios	
		9 CABA Australia	
		10 Mark's Film and TV Supplies	
		11 Smoke Alarm Office	
		12 Neilson IDE Pty Ltd	
		13 Home Appliances	
		14 Red Apple	
		15 Yippee Ki-Yay Models, Minatures and Set Effects	
		16 Carnival Films	
		<u>Campbell St</u>	Office/Warehouse/Industrial
		17 Explore and Develop	
		18 Early Learning Centre	
		19 Avis	
		20 Wildia	
		21 Barham Industries	
		22 VACANT (250 sq.m)	
		23 Barham Manufacturing	
		24 Mazda Service Centre	
		25 Europcar	
		26 Preprint Logistics	
		27 VACANT (250 sq.m)	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
25	14,890	<u>Hotham Pde</u>	Office/Warehouse/Industrial
		1 Thrifty	
		2 Armchair Racer	
		3 Hercules	
		4 Michael Fahey - SMA	
		5 Dollar Matrix	
		6 Videocraft	
		7 VACANT (262.5 sq.m)	
		8 Natural Power Solutions	
		9 Cast Educational	
		10 GM Investments	
		11 Cortese Prestige Car Services	
		12 Algologie	
		13 IRT House	
		14 J&F Bodyworks	
		15 Xenos Gourmet Food	
		16 Unknown Tenant	
		17 Atlas Motor Body Works	
		<u>Whiting Street</u>	Office/Warehouse/Industrial
		18 Williams & Wood Auto Repairs	
		19 Macray Specialised Services	
		20 Miller Camer Support	
		21 CBC Bearings Power Transmission	
		22 Mine Site Technologies	
		23 G & F Motor Repairs	
		24 Bencole Photography	
		25 Inch-Care Car Detailing	
		26 Thenile.com.au	
		27 Industry Partnershop Photography	
		28 Tyre Power	
		29 Mangenet	
		30 Andrea Motori Auto Service	
		31 One/Car & Van Rental	
		32 Orana Car & Truck Rental	
		33 Cage Security	
26	18,833	<u>Whiting Street</u>	Office/Warehouse/Industrial
		1 Artarmon Car Detailing & Northshore Mechanical Repairs	
		2 Blomdah Medical Ear-piercing	
		3 Betta Concepts	
		4 VACANT (241 sq.m)	
		5 Third Dimension Packaging	
		6 Signwave	
		7 Scuderia Servizio European Automotive Detailing	
		8 Hillite Cleaning Supplies	
		9 VACANT (500 sq.m)	
		10 The Wall Photography	
		11 VACANT (350 sq.m)	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
27	22,977	<u>Whiting Street cont.</u>	Office/Warehouse/Industrial
		12 VA hire.com	
		13 Unknown Tenant	
		14 Leaver Jaguar	
		15 Techtel	
		16 The Car Kit Company	
		17 The Centrefolds of Northshore	
		18 Energy Australia	
		19 TCS John Huxley	
		<u>Dickson Ave</u>	Office/Warehouse/Industrial
		20 Automotive Repairs	
		21 Northshore Classic Auto-Body Centre	
		22 VACANT (1,075 sq.m)	
		23 Pacific Automotive	
		24 VACANT (230 sq.m)	
		25 Flicks	
		26 Complete Accountants	
		27 Pacific Joinery	
		28 Dance Studio	
		29 Bill Long & Co (Print Trade Finishes)	
		30 Silvertrack Digital & Video 8 Media	
		31 VACANT (100 sq.m)	
		32 Nautilus Print Finishing	
		33 VACANT (85 sq.m)	
		34 The Chairman Office Sales	
		35 Reliable Automotive	
		36 VACANT (100 sq.m)	
		37 Unknown Tenant	
		38 Unknown Tenant	
		39 Unknown Tenant	
		40 The Missing Link	
		41 Leon's Engineering	
		42 Artarmon Framing Gallery	
		43 L & P Photography	
		44 Repco	
		45 Artarmon Car Detailing	
		<u>Dickson Ave</u>	Office/Warehouse/Industrial
		1 The Lab Sydney	
		2 Targetti	
		3 Vadoros Quality Ribbons	
		4 Dixon Avenue Indoor Outdoor Furniture	
		5 Australian Urban Tree Services	
		6 VACANT (1,433 sq.m)	
		7 Metro Sound Performance Car Audio	
		8 Odyssey Interiors	
		9 Thule Sweden	
		10 Roof Rack World	
		11 Café	
		12 Kayaking World	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
28	8,744	<u>Carlotta St</u>	Office/Warehouse/Industrial
		13 Vision Smash Repairs	
		14 Audcorp Sales & Audcare Service	
		15 Budget Car Rentals	
		16 GIO Motor Vehicle Assessment	
		17 VACANT block (2,000 sq.m)	
		18 Boral Artarmon Concrete Plant	
		<u>Reserve Rd</u>	Office/Warehouse/Industrial
		1 The Freeway Hotel	
		2 Beyond International Group	
		3 Jax Quick Fix Tyres	
		4 Green & Gold Printing	
		5 Burton & Scerra Mechanical Repairs	
		6 Taxi Rank Building	
29	9,235	<u>Reserve Rd</u>	Office/Warehouse/Industrial
		1 Victoria's Basement	
		2 Scott's Honda Service Centre	
		3 Reece HVAC	
		4 Wilde Air Conditioning	
		5 Forsyth Superior Coffee and Teas	
		6 Surfacetec	
		7 Natural Power Solutions	
		8 Australian Industrial Rope Access	
		9 VACANT (500 sq.m)	
30	13,027	<u>Reserve Rd</u>	Office/Warehouse/Industrial
		1 Fantastic Furniture	
		2 Unknown Tenant	
		3 Artarmon Mechanical Sparkling Car Care	
		4 John R Turk Wholesale Electrical	
		5 Prestige Auto Body Shop	
		6 Audio Visual Events	
		7 FNET Distribution Viva Sunscreens	
		8 Tecnic Awning Centre	
		9 Frontline Printing	
		10 Siekaupgigsaw Joinery	
		11 Wattle Trade Paints	
		12 Higgins	
		13 Immediate Assistance	
		14 Porter's Liquor	
		15 THS	
		16 Spelean	
		17 VACANT (300 sq.m)	
		18 Lawrence & Hanson	
		<u>Cleg St</u>	Office/Warehouse/Industrial
		19 1800 got junk?	
		20 Heatcraft Worldwide Refrigeration	
		21 Evergreen Start Pty Ltd	
		22 Broadlex Commercial and Industrial Services	
		23 Artarmon Smash Repairs	
		24 Heavenly Group of Companies	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
31	5,040	<u>Waltham St</u>	Office/Warehouse/Industrial
		1 Coventry Fasteners	
		2 VACANT (311 sq.m)	
		3 Bee Print Mail	
		4 VACANT (200 sq.m)	
		5 Butterflies - Early Learning Centre	
32	13,173	<u>Taylor Ln</u>	Office/Warehouse/Industrial
		1 Panelcorp Auto Body Repair Group	
		2 VACANT (1,167.9 sq.m)	
		3 Platinum Smash Repairs	
		4 DHL Service Centre	
		5 Academy Tiles	
		6 Photo and Video Imports	
33	11,315	<u>Punch St</u>	Office/Warehouse/Industrial
		1 VACANT (1,030 sq.m)	
		2 Dalmain Engineering and Reconditioning	
		3 GHD	
		4 Acre Wood Childcare	
		5 Lloyd Penn Motorcycles	
		6 Civil Fire Protection Services	
		7 Boomerang Matric	
		8 Mr Drip - Plumbing Professionals	
		9 Unknown Tenant	
		10 Unknown Tenant	
		11 Astro Optical Supplies	
		12 VACANT (180 sq.m)	
		13 VACANT (964 sq.m)	
		14 Lemac	
		15 Ella Bache	
		<u>Lambs Rd</u>	Office/Warehouse/Industrial
		16 Auto France	
		17 Universal Gaskets	
		18 Unknown Tenant	
		<u>Cleg St</u>	Office/Warehouse/Industrial
		19 Melva Engineering	
		20 TAP - Automotive Technician	
		21 Digistor	
		22 Intrec Management	
		23 Unknown Tenant	
		24 Certton	
		25 Menu Company	
		26 Artel Group	
		27 Ivoclar Viva Dent	
		28 Easy Print Australia	
		29 Enterprise Entertainments	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
34	58,524	<u>Cleg St</u>	Office/Warehouse/Industrial
		1 The Printing Department Stylecraft	
		2 Cyber Design	
		3 Karmee Coffee Roasters	
		4 Medi Dent	
		5 Canoe Warehouse	
		6 Sydney Collision Repair Centre	
		7 Unknown Tenant	
		8 Special Operations Rescue	
		9 E & A Motors	
		<u>Herbert St</u>	Office/Warehouse/Industrial
		10 Cyber Design Works	
		11 Engine (engine.net)	
		12 SignARama	
		13 Physio/Hydro Rehab Centre	
		<u>Artarmon Business Court</u>	Office/Warehouse/Industrial
		14 O'Brien	
		15 Bellbird Books	
		16 Robert Coop	
		17 Auscott Ltd	
		18 IBM Australia	
		19 VACANT (1,087.9 sq.m)	
		20 Actrol	
		21 NRMA Car Servicing Centre	
		<u>Lambs Rd</u>	Office/Warehouse/Industrial
		22 Castle Automotive	
		23 Five Ways Garage	
		24 Ray's Lambs Road Auto Repairs	
		25 Howard Chia Corporation	
		<u>St Leonards Corporate Centre</u>	Office/Warehouse/Industrial
		26 Unknown Tenant	
		27 Westcon Group	
		28 Integ Group Auxc Company	
		29 Distribution Central	
		30 Coca Cola South Pacific	
		31 EEC Lighting and Living	
		32 Display BAY	
		33 Zoll Medical	
		34 New South Wales Department of Education and Training	
		35 Capital Office Supplies	
		36 AWS	
		37 RENZ Master Blind	
		38 Duncan Solutions	
		39 Comerga Pty Ltd	
		40 Datacom	
		41 Puddleduck's Child Care Centre	
		42 Simms International	
		43 Westcon Group	
		44 Video Plus 2008 and Showcorp 2008	
		45 Crossmark	
		46 VACANT (1,577 sq.m)	
		47 VACANT (1,248 sq.m)	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
35	59,129	<u>Ella St</u>	Office
		48 Interactive Telecoms	
		49 Currie Group	
		50 Department of Education and Training	
		51 Digital Centre	
		52 Café 39	
		53 VACANT (1,178 sq.m)	
		<u>Herbert St</u>	Office/Warehouse/Industrial
		1 Australia Post	
		2 Mitsubishi Dealership	
		3 Holden Dealership	
		<u>St Leonards Techno Park</u>	Office/Warehouse/Industrial
		4 VACANT (405 sq.m)	
		5 Fast Track Communications	
		6 IDS Displays	
		7 Creative Zoo	
		8 Buildcorp Asset Solutions	
		9 EIZO	
		10 Interior Developments	
		11 PACO Janosen	
		12 VACANT (90 sq.m)	
		13 Striker	
		14 JPM Productions	
		15 VACANT (97 sq.m)	
		16 Xyberdata Recovery	
		17 Absolute Colour Printing	
		18 VACANT (212 sq.m)	
		19 Sweet Little Things	
		20 WPM Japan	
		21 Capital & Refurbishing Contruction	
		22 Australian Veterinary Association	
		23 VACANT (97 sq.m)	
		24 VACANT (87 sq.m)	
		25 Purple Pitchers	
		26 Interactive Controls	
		27 Powernet	
		28 Cooee Brands	
		29 Adventure	
		30 Cookies Kitchen and Café	
		31 Wysiwyg - printing	
		32 Intel	
		33 Wheeler Studios Photography	
		34 Two Men and a Truck	
		35 Peter Allsopp	
		36 Unknown Tenant	
		37 Try and Byte	
		38 Kapow Pictures	
		39 Acid Terra	
		40 Unicard	
		41 Prominent Profile	
		42 Invisalign	
		43 GWA Consultants	
		44 ADO Electrical	
		45 Unknown Tenant	
		46 1001 Optical	
		47 Unknown Tenant	
		48 Security	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
36	52,984	<u>Frederick St</u>	Automotive
		49 Skoda Dealership	
		50 Holden Parts and Service Centre	
		<u>Home HQ</u>	Bulky Goods
		1 VACANT (436 sq.m)	
		2 Power Golf	
		3 Carpet Call	
		4 Winston's Teak	
		5 Not Bread Alone	
		6 Barbara's At Home Furniture	
		7 Toys R Us	
		8 Express Shack	
		9 Pillow Talk	
		10 Snooze	
		11 The Good Guys	
		12 JB Hi-Fi	
		13 Plush	
		14 Original Mattress Factory	
		15 Freedom	
		16 Bay Leather Republic	
		17 Crazy Fish	
		18 Singways	
		19 Mayne Rugs	
		20 Beacon Lighting	
		21 Spa/Jacuzzi	
		22 Light Style	
		23 Adairs	
		24 Pharmacy 4 Less	
		25 VACANT (324 sq.m)	
		26 Babies Galore	
		27 By DeSign	
		28 Dare Gallery	
		29 Howard's Storage World	
		<u>Reserve Rd</u>	Bulky Goods
		30 Bunnings	
		<u>Frederick St</u>	Storage/Office
		31 Kennards Storage	
		32 SBS Broadcasting	
		33 Food at SBS	
		<u>Cleg St</u>	Office/Warehouse/Industrial
		34 Wild Oats	
		35 Alec Mildren Service	
		36 VACANT (844 sq.m)	
37	36,369	<u>Frederick St</u>	Office/Warehouse/Industrial
		1 Tradelink Plumbing Services	
		2 VACANT (5,165 sq.m)	
		3 Storage King	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
38	9,539	<u>No. 12 Frederick St</u>	Office/Warehouse/Industrial
		4 API Security	
		5 Advanced Surgical Design and Manufacturing	
		6 Sunshine Heart	
		7 Client Fit	
		8 Spectrum Printing	
		9 Southern Colour	
		10 Weatherdon and Company	
		11 Australian Post Corporation	
		12 Energy Australia	
		13 Shannons	
		14 TLE Electrical and Data Supplies	
		15 Direct Response Australia	
		<u>North Shore Business Centre</u>	Office/Warehouse/Industrial
		1 Wireless Anywhere Group	
		2 Unknown Tenant	
		3 ARTACT Art and Framing	
		4 Smart Pack Pty Ltd/3P Marketing	
		5 CEL MEC International	
		6 Commercial Energy Services	
		7 Ad-Libitum Pty Ltd	
		8 Solge Energy	
		9 Young Shower Screens	
		10 Five Corners-WMD-GYRUSACMI	
		11 Point of Care Diagnostics	
		12 BJX Pty Ltd	
		13 Prolight/BOAZ Australia	
		14 The Juerdens Group of Companies	
		15 AVE Pty Ltd	
		16 MUTOH Australia	
		17 JARASS Pty Ltd	
		18 Cosmac Surgical/Access Home Health	
		19 Road Worz	
		20 sparerroom.com.au	
		21 Winevault	
39	7,623	<u>Enterprise Centre</u>	Office/Warehouse/Industrial
		1 Craftsmen Office Interior	
		2 Design Awards	
		3 Sydney Audio Visual	
		4 Stone Italiana	
		5 Delta Services and Bretco Electric	
		6 PGM Group	
		7 HSY	
		8 Australac Services	
		9 Pane Italia - bakery	
		10 The Roo Brothers	
		11 APK	
		12 Texas Productions	
		13 Value Added Promotions	
		14 DAVGAC	
		15 HY Performance Valves	
		16 VACANT (150 sq.m)	
		17 Taymar Brochure Holders	

Key Site Attributes			
Block	Area (sq.m)	Tenant	Use
40 & 41	8,006	<u>No. 80-82 Reserve Rd</u>	Office/Warehouse/Industrial
		1 Plumbers Suppliers	
		2 Rank Worth Enterprises	
		3 Fluid Seals and Packings	
		4 The Roofing Shop	
		5 Go Electrical	
		6 Matrix Digital	
		7 Hyland Printing	
		8 OEM Technology Solutions	
		9 Pink Hygienic Solutions	
		10 Doyle's Artarmon	
		11 Australian Glass Trophies and Awards	
		12 MDM Embedded and OEM Technology Solutions	
		13 Plunkett and Johnson Graphics and Technology	
		14 Positive Energy	
		15 Artico Pty Ltd	
		16 Amarisco Mounting Laminating and Picture Framing	
		17 Tech Trader	
		18 Twin Loop Binding	
		19 Jennings Plumbing Services	
		20 Air-Tite Installations	
		21 Ozcam Productions	
		22 Storage King	
42	4,215	<u>Artarmon Business Centre</u>	Office/Warehouse/Industrial
		1 State Interior	
		2 Hard Heart	
		3 Magi Board Presentations	
		4 Omega Press	
		5 Scene Change	
		6 East Coast Audio Visual	
		7 DNA - Digital Networks Australia	
		8 Order In Catering Services	
		9 Owen International	
		10 Unknown Tenant	
		11 United Campus Bookshops	
		12 Ogalo	
		13 JH Events	
		14 Audio Visual Events	
		15 Col Bros Electrical Contracting	
		16 Unknown Tenant	
		17 ABC Sandwich Shop	
		18 GMEC Solutions and Accord	
		19 carpethire.com	
		20 VACANT (200 sq.m)	
		21 Big Colour	
		22 Unknown Tenant	
		23 Artarmon Tool Mfg	
		24 Essence Design	
		25 QB Interiors	
43	8,627	Artarmon Waste and Recycling	
44	3,370	Hanson Concrete Batching Plant	
45 - 49	13,961	ABC Broadcasting	Office/Warehouse/Industrial
50	46,822	Gore Hill (u/c)	Office/Warehouse/Industrial

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